

## Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code  
(except black lung benefit trust or private foundation)

2011

Open to Public  
InspectionDepartment of the Treasury  
Internal Revenue Service

▶ The organization may have to use a copy of this return to satisfy state reporting requirements

<b>A</b> For the 2011 calendar year, or tax year beginning , 2011, and ending ,	
<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization <b>Donors Trust, Inc.</b> Doing Business As Number and street (or P.O. box if mail is not delivered to street addr) Room/suite <b>109 North Henry Street</b> City, town or country State ZIP code + 4 <b>Alexandria VA 22314-2903</b> <b>D</b> Employer Identification Number <b>52-2166327</b> <b>E</b> Telephone number <b>(703) 535-3563</b> <b>G</b> Gross receipts \$ <b>48,820,998.</b> <b>H(a)</b> Is this a group return for affiliates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H(b)</b> Are all affiliates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list (see instructions) <b>H(c)</b> Group exemption number ▶
<b>F</b> Name and address of principal officer <b>Whitney L. Ball 109 North Henry Street Alexandria VA 22314</b> <b>I</b> Tax-exempt status <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) ◀ (insert no ) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527 <b>J</b> Website: ▶ <b>www.donorstrust.org</b>	
<b>K</b> Form of organization <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶ <b>L</b> Year of Formation <b>1999</b> <b>M</b> State of legal domicile <b>VA</b>	

<b>Part I Summary</b>	
<b>Activities &amp; Governance</b>	1 Briefly describe the organization's mission or most significant activities. <u>SUPPORT CHARITIES &amp; SPONSOR PROGRAMS WHICH ALLEVIATE, THROUGH EDUCATION, RESEARCH &amp; PRIVATE INITIATIVES, SOCIETY'S MOST PERVASIVE AND RADICAL NEEDS, INCLUDING THOSE RELATING TO SOCIAL WELFARE, HEALTH, ENVIRONMENT, ECONOMICS, GOVERNANCE, FOREIGN RELATIONS AND ARTS AND CULTURE.</u>
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.
	3 Number of voting members of the governing body (Part VI, line 1a) <b>3</b>
	4 Number of independent voting members of the governing body (Part VI, line 1b) <b>4</b>
	5 Total number of individuals employed in calendar year 2011 (Part V, line 2a) <b>8</b>
	6 Total number of volunteers (estimate if necessary) <b>0</b>
	7a Total unrelated business revenue from Part VIII, column (C), line 12 <b>0.</b>
7b Net unrelated business taxable income from Form 990-T, line 34 <b>0.</b>	
<b>Revenue</b>	8 Contributions and grants (Part VIII, line 1h) <b>28,998,795.</b>
	9 Program service revenue (Part VIII, line 2g) <b>420,789.</b>
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) <b>148,043.</b>
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) <b>29,567,627.</b>
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) <b>40,127,442.</b>
<b>Expenses</b>	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) <b>22,217,277.</b>
	14 Benefits paid to or for members (Part IX, column (A), line 4) <b>572,225.</b>
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) <b>631,296.</b>
	16a Professional fundraising fees (Part IX, column (A), line 11e) <b>2,275,825.</b>
	b Total fundraising expenses (Part IX, column (D), line 25) ▶ <b>242,177.</b>
<b>Net Assets or Fund Balances</b>	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) <b>25,065,327.</b>
	18 Total expenses. Add lines 13-18 (must equal Part IX, column (A), line 25) <b>4,502,300.</b>
	19 Revenues less expenses. Subtract line 18 from line 12 <b>7,962,575.</b>
	20 Total assets (Part X, line 16) <b>18,409,511.</b>
	21 Total liabilities (Part X, line 26) <b>14,401.</b>
22 Net assets or fund balances. Subtract line 21 from line 20 <b>26,017,669.</b>	

<b>Part II Signature Block</b>	
Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.	
<b>Sign Here</b>	Signature of officer <i>Whitney L. Ball</i> Date <b>11/19/12</b>
	Whitney L. Ball, President & CEO Type or print name and title
<b>Paid Preparer Use Only</b>	Print/Type preparer's name Preparer's signature
	Firm's name ▶ Firm's address ▶

May the IRS discuss this return with the preparer shown above? (see instructions)

BAA For Paperwork Reduction Act Notice, see the separate instruction

SCANNED DEC 18 2012

**Part III** Statement of Program Service Accomplishments

Check if Schedule O contains a response to any question in this Part III

☒

1 Briefly describe the organization's mission.

SUPPORT CHARITIES WHICH ALLEVIATE, THROUGH EDUCATION, RESEARCH AND PRIVATE  
INITIATIVES, SOCIETY'S MOST PERVASIVE AND RADICAL NEEDS, INCLUDING THOSE

See Form 990, Page 2, Part III, Line 1 (continued)

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If 'Yes,' describe these new services on Schedule O

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☒ Yes ☐ No

If 'Yes,' describe these changes on Schedule O

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a (Code: ) (Expenses \$ 30,003,855. including grants of \$ 29,525,114.) (Revenue \$ 0.)

DAF PROGRAM - A DONOR ADVISED FUND (DAF) PROGRAM ALLOWING DAF CONTRIBUTORS TO  
ADVISE GRANTS THAT SUPPORT CHARITIES WHICH ALLEVIATE, THROUGH EDUCATION,  
RESEARCH AND PRIVATE INITIATIVES, SOCIETY'S MOST PERVASIVE AND RADICAL NEEDS,  
INCLUDING THOSE RELATING TO SOCIAL WELFARE, HEALTH, ENVIRONMENT, ECONOMICS,  
GOVERNANCE, FOREIGN RELATIONS AND ARTS AND CULTURE; AND WHICH ENCOURAGE  
PRIVATE PHILANTHROPY AND INDIVIDUAL GIVING AND RESPONSIBILITY AS AN ANSWER TO  
SOCIETY'S NEEDS, AS OPPOSED TO GOVERNMENTAL INVOLVEMENT.

4b (Code: ) (Expenses \$ 208,931. including grants of \$ 0.) (Revenue \$ 50.)

NEW PHILANTHROPY STUDIES (NPS). THE PROJECT FOR NEW PHILANTHROPY STUDIES IS A  
PROGRAM THAT ENGAGES AND ENCOURAGES SCHOLARS AND PRACTITIONERS SEEKING TO  
BETTER UNDERSTAND THE ROLE OF VOLUNTARY ACTION AND PHILANTHROPY IN  
ACHIEVING SOCIAL COOPERATION AND DISTRIBUTION OF PRIVATE AND PUBLIC GOODS.

4c (Code: ) (Expenses \$ 483,773. including grants of \$ 0.) (Revenue \$ 24,519.)

CENTER FOR COLLEGE AFFORDABILITY AND PRODUCTIVITY (CCAP).  
THE CENTER FOR COLLEGE AFFORDABILITY AND PRODUCTIVITY IS A PROGRAM DESIGNED  
TO RESEARCH AND STUDY THE ECONOMICS OF HIGHER EDUCATION, IN PARTICULAR, ISSUES  
OF PRODUCTIVITY, EFFICIENCY, ACCOUNTABILITY, AND TRANSPARENCY.

4d Other program services (Describe in Schedule O )

(Expenses \$ 1,178,231. including grants of \$ 196,903.) (Revenue \$ 87,000.)

4e Total program service expenses 31,874,790.

**Part IV Checklist of Required Schedules**

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If 'Yes,' complete Schedule A	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)?	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I		X
4 <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If 'Yes,' complete Schedule C, Part II		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If 'Yes,' complete Schedule C, Part III		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If 'Yes,' complete Schedule D, Part I	X	
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? If 'Yes,' complete Schedule D, Part II		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If 'Yes,' complete Schedule D, Part III		X
9 Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If 'Yes,' complete Schedule D, Part IV		X
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If 'Yes,' complete Schedule D, Part V	X	
11 If the organization's answer to any of the following questions is 'Yes,' then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable		
a Did the organization report an amount for land, buildings and equipment in Part X, line 10? If 'Yes,' complete Schedule D, Part VI	X	
b Did the organization report an amount for investments— other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VII		X
c Did the organization report an amount for investments— program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VIII		X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part IX		X
e Did the organization report an amount for other liabilities in Part X, line 25? If 'Yes,' complete Schedule D, Part X		X
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If 'Yes,' complete Schedule D, Part X		X
12a Did the organization obtain separate, independent audited financial statements for the tax year? If 'Yes,' complete Schedule D, Parts XI, XII, and XIII	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? If 'Yes,' and if the organization answered 'No' to line 12a, then completing Schedule D, Parts XI, XII, and XIII is optional		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If 'Yes,' complete Schedule F, Parts I and IV		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? If 'Yes,' complete Schedule F, Parts II and IV		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? If 'Yes,' complete Schedule F, Parts III and IV		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If 'Yes,' complete Schedule G, Part I (see instructions)		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If 'Yes,' complete Schedule G, Part II		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If 'Yes,' complete Schedule G, Part III		X
20 a Did the organization operate one or more hospital facilities? If 'Yes,' complete Schedule H		X
b If 'Yes' to line 20a, did the organization attach a copy of its audited financial statements to this return?		

**Part IV Checklist of Required Schedules (continued)**

	Yes	No
<b>21</b> Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? <i>If 'Yes,' complete Schedule I, Parts I and II</i>	<b>21</b> X	
<b>22</b> Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If 'Yes,' complete Schedule I, Parts I and III</i>	<b>22</b>	X
<b>23</b> Did the organization answer 'Yes' to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If 'Yes,' complete Schedule J</i>	<b>23</b> X	
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, and that was issued after December 31, 2002? <i>If 'Yes,' answer lines 24b through 24d and complete Schedule K. If 'No,' go to line 25</i>	<b>24a</b>	X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	<b>24b</b>	
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	<b>24c</b>	
<b>d</b> Did the organization act as an 'on behalf of' issuer for bonds outstanding at any time during the year?	<b>24d</b>	
<b>25a Section 501(c)(3) and 501(c)(4) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If 'Yes,' complete Schedule L, Part I</i>	<b>25a</b>	X
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If 'Yes,' complete Schedule L, Part I</i>	<b>25b</b>	X
<b>26</b> Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If 'Yes,' complete Schedule L, Part II</i>	<b>26</b>	X
<b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If 'Yes,' complete Schedule L, Part III</i>	<b>27</b>	X
<b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
<b>a</b> A current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i>	<b>28a</b>	X
<b>b</b> A family member of a current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i>	<b>28b</b>	X
<b>c</b> An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If 'Yes,' complete Schedule L, Part IV</i>	<b>28c</b>	X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If 'Yes,' complete Schedule M</i>	<b>29</b> X	
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If 'Yes,' complete Schedule M</i>	<b>30</b>	X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If 'Yes,' complete Schedule N, Part I</i>	<b>31</b>	X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If 'Yes,' complete Schedule N, Part II</i>	<b>32</b>	X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If 'Yes,' complete Schedule R, Part I</i>	<b>33</b> X	
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If 'Yes,' complete Schedule R, Parts II, III, IV, and V, line 1</i>	<b>34</b> X	
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)?	<b>35a</b>	X
<b>b</b> Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If 'Yes,' complete Schedule R, Part V, line 2</i>	<b>35b</b>	X
<b>36 Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If 'Yes,' complete Schedule R, Part V, line 2</i>	<b>36</b>	X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If 'Yes,' complete Schedule R, Part VI</i>	<b>37</b>	X
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O	<b>38</b> X	

BAA

Form 990 (2011)

**Part V Statements Regarding Other IRS Filings and Tax Compliance**Check if Schedule O contains a response to any question in this Part V ☐

		Yes	No
<b>1a</b> Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable.	<b>1a</b> 63		
<b>b</b> Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable.	<b>1b</b> 0		
<b>c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	<b>1c</b>	X	
<b>2a</b> Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return.	<b>2a</b> 8		
<b>b</b> If at least one is reported on line 2a, did the organization file all required federal employment tax returns? <b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions).	<b>2b</b>	X	
<b>3a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year?	<b>3a</b>		X
<b>b</b> If 'Yes,' has it filed a Form 990-T for this year? If 'No,' provide an explanation in Schedule O.	<b>3b</b>		
<b>4a</b> At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	<b>4a</b>		X
<b>b</b> If 'Yes,' enter the name of the foreign country. See instructions for filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.			
<b>5a</b> Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	<b>5a</b>		X
<b>b</b> Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	<b>5b</b>		X
<b>c</b> If 'Yes,' to line 5a or 5b, did the organization file Form 8886-T?	<b>5c</b>		
<b>6a</b> Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?	<b>6a</b>		X
<b>b</b> If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	<b>6b</b>		
<b>7 Organizations that may receive deductible contributions under section 170(c).</b>			
<b>a</b> Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	<b>7a</b>		X
<b>b</b> If 'Yes,' did the organization notify the donor of the value of the goods or services provided?	<b>7b</b>		
<b>c</b> Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	<b>7c</b>		X
<b>d</b> If 'Yes,' indicate the number of Forms 8282 filed during the year.	<b>7d</b>		
<b>e</b> Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<b>7e</b>		X
<b>f</b> Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	<b>7f</b>		X
<b>g</b> If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	<b>7g</b>		X
<b>h</b> If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	<b>7h</b>		X
<b>8 Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.</b> Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?	<b>8</b>		X
<b>9 Sponsoring organizations maintaining donor advised funds.</b>			
<b>a</b> Did the organization make any taxable distributions under section 4966?	<b>9a</b>		X
<b>b</b> Did the organization make a distribution to a donor, donor advisor, or related person?	<b>9b</b>		X
<b>10 Section 501(c)(7) organizations.</b> Enter:			
<b>a</b> Initiation fees and capital contributions included on Part VIII, line 12.	<b>10a</b>		
<b>b</b> Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities.	<b>10b</b>		
<b>11 Section 501(c)(12) organizations.</b> Enter:			
<b>a</b> Gross income from members or shareholders.	<b>11a</b>		
<b>b</b> Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	<b>11b</b>		
<b>12a Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?	<b>12a</b>		
<b>b</b> If 'Yes,' enter the amount of tax-exempt interest received or accrued during the year.	<b>12b</b>		
<b>13 Section 501(c)(29) qualified nonprofit health insurance issuers.</b>			
<b>a</b> Is the organization licensed to issue qualified health plans in more than one state? <b>Note.</b> See the instructions for additional information the organization must report on Schedule O.	<b>13a</b>		
<b>b</b> Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans.	<b>13b</b>		
<b>c</b> Enter the amount of reserves on hand.	<b>13c</b>		
<b>14a</b> Did the organization receive any payments for indoor tanning services during the tax year?	<b>14a</b>		X
<b>b</b> If 'Yes,' has it filed a Form 720 to report these payments? If 'No,' provide an explanation in Schedule O.	<b>14b</b>		

**Part VI Governance, Management and Disclosure** For each 'Yes' response to lines 2 through 7b below, and for a 'No' response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response to any question in this Part VI

☒**Section A. Governing Body and Management**

	Yes	No
<b>1a</b> Enter the number of voting members of the governing body at the end of the tax year. If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.	5	
<b>1b</b> Enter the number of voting members included in line 1a, above, who are independent	4	
<b>2</b> Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee or key employee?	2	X
<b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?	3	X
<b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4	X
<b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets?	5	X
<b>6</b> Did the organization have members or stockholders?	6	X
<b>7a</b> Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a	X
<b>b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or other persons other than the governing body?	7b	X
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>a</b> The governing body?	8a	X
<b>b</b> Each committee with authority to act on behalf of the governing body?	8b	X
<b>9</b> Is there any officer, director or trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If 'Yes,' provide the names and addresses in Schedule O	9	X

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
<b>10a</b> Did the organization have local chapters, branches, or affiliates?	10a	X
<b>b</b> If 'Yes,' did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b	
<b>11a</b> Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	X
<b>b</b> Describe in Schedule O the process, if any, used by the organization to review this Form 990		
<b>12a</b> Did the organization have a written conflict of interest policy? If 'No,' go to line 13	12a	X
<b>b</b> Were officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X
<b>c</b> Did the organization regularly and consistently monitor and enforce compliance with the policy? If 'Yes,' describe in Schedule O how this is done	12c	X
<b>13</b> Did the organization have a written whistleblower policy?	13	X
<b>14</b> Did the organization have a written document retention and destruction policy?	14	X
<b>15</b> Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>a</b> The organization's CEO, Executive Director, or top management official	15a	X
<b>b</b> Other officers of key employees of the organization	15b	X
If 'Yes' to line 15a or 15b, describe the process in Schedule O. (See instructions.)		
<b>16a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	X
<b>b</b> If 'Yes,' did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?	16b	

**Section C. Disclosure**

**17** List the states with which a copy of this Form 990 is required to be filed ▶ \_\_\_\_\_

**18** Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.

☐ Own website ☐ Another's website ☒ Upon request

**19** Describe in Schedule O whether (and if so, how) the organization makes its governing documents, conflict of interest policy, and financial statements available to the public during the tax year

**20** State the name, physical address, and telephone number of the person who possesses the books and records of the organization

▶ Donors Trust 109 N Henry St, Alexandria, VA 22314-2903 (703) 535-3563

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Check if Schedule O contains a response to any question in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1 a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
  - List all of the organization's **current** key employees, if any. See instructions for definition of 'key employee.'
  - List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
  - List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
  - List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.
- List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee

(A) Name and title	(B) Average hours per week (describe hours for related organizations in Schedule O)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) <u>Whitney L. Ball</u> President & CEO	40.00	X		X		X		198,584.	0.	19,858.
(2) <u>Kimberly O. Dennis</u> Chairman	0.00	X						0.	0.	0.
(3) <u>James Piereson</u> Vice Chairman	0.00	X						0.	0.	0.
(4) <u>Nathaniel C. Moffat</u> Director	0.00	X						0.	0.	0.
(5) <u>William J. Hume</u> Director	0.00	X						0.	0.	0.
(6) <u>Jeffrey C. Zysik</u> CFO, Sec-Treas.	40.00			X		X		160,000.	0.	0.
(7) <u>ALL MAY BE REACHED</u> <u>AT THE ORGANIZATION</u>										
(8) _____										
(9) _____										
(10) _____										
(11) _____										
(12) _____										
(13) _____										
(14) _____										

**Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (cont)**

(A) Name and title	(B) Average hours per week (describe hours for related organizations in Sch O)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(15) _____										
(16) _____										
(17) _____										
(18) _____										
(19) _____										
(20) _____										
(21) _____										
(22) _____										
(23) _____										
(24) _____										
(25) _____										
<b>1 b Sub-total</b>								358,584.	0.	19,858.
<b>c Total from continuation sheets to Part VII, Section A</b>										
<b>d Total (add lines 1b and 1c)</b>								358,584.	0.	19,858.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **2**

3 Did the organization list any **former** officer, director or trustee, key employee, or highest compensated employee on line 1a? If 'Yes,' complete Schedule J for such individual

4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If 'Yes' complete Schedule J for such individual

5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If 'Yes,' complete Schedule J for such person

	Yes	No
3		X
4	X	
5		X

**Section B. Independent Contractors**

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year

(A) Name and business address	(B) Description of services	(C) Compensation
Richard Vedder 7464 Ridgeview Circle Athens OH 45701	Research, writing, speaking, and administration	150,000.
Ted Frank 901 N Monroe St #1007 Arlington VA 22201	Legal services	198,000.
Claire Kittle 2868 Tradewind Dr Mount Pleasant SC 29466	Administrative and recruiting se	108,000.

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization **3**



<b>Part VIII</b>	<b>Statement of Revenue</b>
------------------	-----------------------------

Part VII Statement of Revenue				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514	
CONTRIBUTIONS, GIFTS, GRANTS AND OTHER SIMILAR AMOUNTS	1a Federated campaigns	1a						
	b Membership dues	1b						
	c Fundraising events	1c						
	d Related organizations	1d						
	e Government grants (contributions)	1e						
	f All other contributions, gifts, grants, and similar amounts not included above	1f	39,267,594.					
	g Noncash contributions included in lns 1a-1f.		\$ 2,078,774.					
	h Total. Add lines 1a-1f							39,267,594.
PROGRAM SERVICE REVENUE			Business Code					
	2a Administration services	561000	662,685.	0.	0.	662,685.		
	b Subscriptions - NPS	511120	50.	50.	0.	0.		
	c Legal fee recovery	541100	87,000.	87,000.	0.	0.		
	d Research, writing, editing	541900	24,519.	24,519.	0.	0.		
	e							
	f All other program service revenue							
	g Total. Add lines 2a-2f			774,254.				
OTHER REVENUE	3 Investment income (including dividends, interest and other similar amounts)			206,988.	0.	0.	206,988.	
	4 Income from investment of tax-exempt bond proceeds							
	5 Royalties							
			(i) Real	(ii) Personal				
	6a Gross rents							
	b Less rental expenses							
	c Rental income or (loss)							
	d Net rental income or (loss)							
			(i) Securities	(ii) Other				
	7a Gross amount from sales of assets other than inventory		8,572,162.					
	b Less: cost or other basis and sales expenses		8,693,556.					
	c Gain or (loss)		-121,394.					
	d Net gain or (loss)				-121,394.	0.	0.	-121,394.
	8a Gross income from fundraising events (not including \$ of contributions reported on line 1c). See Part IV, line 18		a					
	b Less direct expenses		b					
	c Net income or (loss) from fundraising events							
	9a Gross income from gaming activities See Part IV, line 19		a					
	b Less: direct expenses		b					
	c Net income or (loss) from gaming activities							
	10a Gross sales of inventory, less returns and allowances		a					
b Less: cost of goods sold		b						
c Net income or (loss) from sales of inventory								
Miscellaneous Revenue		Business Code						
11a								
b								
c								
d All other revenue								
e Total. Add lines 11a-11d								
12 Total revenue. See instructions				40,127,442.	111,569.	0.	748,279.	

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

Check if Schedule O contains a response to any question in this Part IX ☐

<b>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</b>	<b>(A) Total expenses</b>	<b>(B) Program service expenses</b>	<b>(C) Management and general expenses</b>	<b>(D) Fundraising expenses</b>
1 Grants and other assistance to governments and organizations in the United States. See Part IV, line 21	29,722,017.	29,722,017.		
2 Grants and other assistance to individuals in the United States. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the United States. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	378,443.	248,144.	34,922.	95,377.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	198,422.	137,589.	28,628.	32,205.
8 Pension plan accruals and contributions (include section 401(k) and section 403(b) employer contributions)				
9 Other employee benefits	19,386.	12,963.	2,136.	4,287.
10 Payroll taxes	35,045.	23,434.	3,860.	7,751.
11 Fees for services (non-employees):				
a Management				
b Legal	439,635.	435,678.	3,957.	0.
c Accounting	20,080.	9,489.	10,591.	0.
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	37,113.	36,863.	250.	0.
g Other	901,380.	892,670.	3,978.	4,732.
12 Advertising and promotion	86,002.	28,868.	0.	57,134.
13 Office expenses	14,973.	11,354.	1,407.	2,212.
14 Information technology	23,884.	16,097.	2,437.	5,350.
15 Royalties				
16 Occupancy	55,069.	38,656.	6,383.	10,030.
17 Travel	130,131.	114,565.	0.	15,566.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	7,879.	5,515.	919.	1,445.
23 Insurance	3,802.	2,661.	444.	697.
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a <u>Printing &amp; production</u>	28,655.	26,474.	0.	2,181.
b <u>Postage &amp; delivery</u>	10,629.	9,551.	419.	659.
c <u>Telephone</u>	4,971.	3,548.	553.	870.
d <u>Utilities</u>	4,703.	3,292.	549.	862.
e All other expenses	42,648.	40,362.	1,467.	819.
25 <b>Total functional expenses.</b> Add lines 1 through 24e	32,164,867.	31,819,790.	102,900.	242,177.
26 <b>Joint costs.</b> Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

**Part X Balance Sheet**

		(A) Beginning of year		(B) End of year
<b>ASSETS</b>	1 Cash — non-interest-bearing		1	
	2 Savings and temporary cash investments	15,309,010.	2	20,222,498.
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net	67,820.	4	79,329.
	5 Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5	
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions)		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges		9	
	10a Land, buildings, and equipment, cost or other basis. Complete Part VI of Schedule D	10a 81,215.		
	b Less: accumulated depreciation	10b 47,207.	36,632.	10c 34,008.
	11 Investments — publicly traded securities	2,979,850.	11	5,426,007.
	12 Investments — other securities. See Part IV, line 11	0.	12	350,000.
	13 Investments — program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11	16,199.	15	16,199.
16 <b>Total assets.</b> Add lines 1 through 15 (must equal line 34)	18,409,511.	16	26,128,041.	
<b>LIABILITIES</b>	17 Accounts payable and accrued expenses	14,401.	17	89,522.
	18 Grants payable	0.	18	20,850.
	19 Deferred revenue		19	
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22	
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D		25	
	26 <b>Total liabilities.</b> Add lines 17 through 25	14,401.	26	110,372.
<b>NET ASSETS OR FUND BALANCES</b>	<b>Organizations that follow SFAS 117, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27 through 29 and lines 33 and 34.</b>			
	27 Unrestricted net assets	18,395,110.	27	26,017,669.
	28 Temporarily restricted net assets		28	
	29 Permanently restricted net assets		29	
	<b>Organizations that do not follow SFAS 117, check here</b> <input type="checkbox"/> <b>and complete lines 30 through 34.</b>			
	30 Capital stock or trust principal, or current funds		30	
	31 Paid-in or capital surplus, or land, building, or equipment fund		31	
	32 Retained earnings, endowment, accumulated income, or other funds		32	
	33 <b>Total net assets or fund balances</b>	18,395,110.	33	26,017,669.
34 <b>Total liabilities and net assets/fund balances</b>	18,409,511.	34	26,128,041.	

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Form 990 (2011)

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response to any question in this Part XI

☒

1	Total revenue (must equal Part VIII, column (A), line 12)	1	40,127,442.
2	Total expenses (must equal Part IX, column (A), line 25)	2	32,164,867.
3	Revenue less expenses Subtract line 2 from line 1	3	7,962,575.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	18,395,110.
5	Other changes in net assets or fund balances (explain in Schedule O)	5	-340,016.
6	Net assets or fund balances at end of year Combine lines 3, 4, and 5 (must equal Part X, line 33, column (B))	6	26,017,669.

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response to any question in this Part XII

☐1 Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other

If the organization changed its method of accounting from a prior year or checked 'Other,' explain in Schedule O

2a Were the organization's financial statements compiled or reviewed by an independent accountant?

b Were the organization's financial statements audited by an independent accountant?

c If 'Yes' to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?

If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.

d If 'Yes' to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a separate basis, consolidated basis, or both.

☐ Separate basis ☒ Consolidated basis ☐ Both consolidated and separate basis

3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?

b If 'Yes,' did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits

	Yes	No
1		
2a		X
2b	X	
2c	X	
d		
3a		X
3b		

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Form 990 (2011)

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

► Attach to Form 990 or Form 990-EZ. ► See separate instructions.

OMB No 1545-0047

**2011**

**Open to Public Inspection**

Name of the organization

Donors Trust, Inc.

Employer identification number

52-2166327

**Part I Reason for Public Charity Status** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1 ☐ A church, convention of churches or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 ☐ A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 ☐ An organization that normally receives: (1) more than 33-1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions — subject to certain exceptions, and (2) no more than 33-1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3)**. Check the box that describes the type of supporting organization and complete lines 11e through 11h.
  - a ☐ Type I
  - b ☐ Type II
  - c ☐ Type III — Functionally integrated
  - d ☐ Type III — Other
- e ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
- f ☐ If the organization received a written determination from the IRS that is a Type I, Type II or Type III supporting organization, check this box.
- g ☐ Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

- (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?
- (ii) A family member of a person described in (i) above?
- (iii) A 35% controlled entity of a person described in (i) or (ii) above?

	Yes	No
11 g (i)		
11 g (ii)		
11 g (iii)		

h Provide the following information about the supported organization(s)

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in column (i) listed in your governing document?		(v) Did you notify the organization in column (i) of your support?		(vi) Is the organization in column (i) organized in the U.S.?		(vii) Amount of support
			Yes	No	Yes	No	Yes	No	
(A)									
(B)									
(C)									
(D)									
(E)									
Total									

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule A (Form 990 or 990-EZ) 2011

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any 'unusual grants'.)	12,188,446.	10,634,041.	16,778,729.	28,998,795.	39,267,594.	107,867,605.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 <b>Total.</b> Add lines 1 through 3	12,188,446.	10,634,041.	16,778,729.	28,998,795.	39,267,594.	107,867,605.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						13,552,791.
6 <b>Public support.</b> Subtract line 5 from line 4						94,314,814.

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(f) Total
7 Amounts from line 4	12,188,446.	10,634,041.	16,778,729.	28,998,795.	39,267,594.	107,867,605.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	271,453.	284,903.	70,330.	80,800.	206,988.	914,474.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets. (Explain in Part IV.)						
11 <b>Total support.</b> Add lines 7 through 10						108,782,079.
12 Gross receipts from related activities, etc. (see instructions)					12	
13 <b>First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> ▶ <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

14 Public support percentage for 2011 (line 6, column (f) divided by line 11, column (f))	14	86.70 %
15 Public support percentage from 2010 Schedule A, Part II, line 14	15	82.22 %
16a <b>33-1/3% support test – 2011.</b> If the organization did not check the box on line 13, and the line 14 is 33-1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization ▶ <input checked="" type="checkbox"/>		
b <b>33-1/3% support test – 2010.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
17a <b>10%-facts-and-circumstances test – 2011.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
b <b>10%-facts-and-circumstances test – 2010.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization ▶ <input type="checkbox"/>		
18 <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶ <input type="checkbox"/>		

BAA

Schedule A (Form 990 or 990-EZ) 2011

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal yr beginning in) ▶	(a) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(f) Total
1 Gifts, grants, contributions and membership fees received (Do not include any 'unusual grants').						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose.						
3 Gross receipts from activities that are not an unrelated trade or business under section 513.						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf.						
5 The value of services or facilities furnished by a governmental unit to the organization without charge.						
6 <b>Total.</b> Add lines 1 through 5.						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons.						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year.						
c Add lines 7a and 7b.						
8 <b>Public support.</b> (Subtract line 7c from line 6.)						

**Section B. Total Support**

Calendar year (or fiscal yr beginning in) ▶	(a) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(f) Total
9 Amounts from line 6.						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources.						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						
c Add lines 10a and 10b.						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on.						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 <b>Total support.</b> (Add lines 9, 10c, 11, and 12.)						

14 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ☐

**Section C. Computation of Public Support Percentage**

15 Public support percentage for 2011 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2010 Schedule A, Part III, line 15	16	%

**Section D. Computation of Investment Income Percentage**

17 Investment income percentage for 2011 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2010 Schedule A, Part III, line 17	18	%

19a **33-1/3% support tests – 2011.** If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ☐

b **33-1/3% support tests – 2010.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

**Part IV** **Supplemental Information.** Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).



**SCHEDULE D  
(Form 990)**Department of the Treasury  
Internal Revenue Service

Name of the organization

**Supplemental Financial Statements**

▶ **Complete if the organization answered 'Yes,' to Form 990, Part IV, lines 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**  
▶ **Attach to Form 990. ▶ See separate instructions.**

OMB No 1545-0047

**2011****Open to Public  
Inspection**

Employer identification number

Donors Trust, Inc.

52-2166327

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year	177.	
2 Aggregate contributions to (during year)	37,767,694.	
3 Aggregate grants from (during year)	29,525,114.	
4 Aggregate value at end of year	21,948,959.	

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☒ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☒ Yes ☐ No

**Part II Conservation Easements.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

- ☐ Preservation of land for public use (e.g., recreation or education) ☐ Preservation of an historically important land area  
☐ Protection of natural habitat ☐ Preservation of a certified historic structure  
☐ Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

a Total number of conservation easements

b Total acreage restricted by conservation easements

c Number of conservation easements on a certified historic structure included in (a)

d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register

	Held at the End of the Tax Year
2a	
2b	
2c	
2d	

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶

4 Number of states where property subject to conservation easement is located ▶

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year ▶

7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ▶ \$

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.**

Complete if the organization answered 'Yes' to Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenues included in Form 990, Part VIII, line 1 ▶ \$

(ii) Assets included in Form 990, Part X ▶ \$

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items

a Revenues included in Form 990, Part VIII, line 1 ▶ \$

b Assets included in Form 990, Part X ▶ \$

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply).

- a ☐ Public exhibition  
 b ☐ Scholarly research  
 c ☐ Preservation for future generations

- d ☐ Loan or exchange programs  
 e ☐ Other \_\_\_\_\_

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

**Part IV Escrow and Custodial Arrangements.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If 'Yes,' explain the arrangement in Part XIV and complete the following table:

	Amount
1c	
1d	
1e	
1f	

2a Did the organization include an amount on Form 990, Part X, line 21? ☐ Yes ☐ No

b If 'Yes,' explain the arrangement in Part XIV

**Part V Endowment Funds.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	16,684,776.	12,051,906.	8,939,680.	9,448,610.	
b Contributions	39,141,594.	28,817,945.	16,592,079.	10,548,791.	
c Net investment earnings, gains, and losses	-154,463.	249,299.	324,215.	-472,097.	
d Grants or scholarships	29,525,114.	22,172,327.	12,641,403.	9,366,969.	
e Other expenditures for facilities and programs	1,712,039.	1,912,824.	976,327.	1,103,256.	
f Administrative expenses	432,900.	349,223.	186,338.	115,399.	
g End of year balance	24,001,854.	16,684,776.	12,051,906.	8,939,680.	

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

- a Board designated or quasi-endowment ▶ 100.00 %  
 b Permanent endowment ▶ 0.00 %  
 c Temporarily restricted endowment ▶ 0.00 %

The percentages in lines 2a, 2b, and 2c should equal 100%

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

- (i) unrelated organizations  
 (ii) related organizations

	Yes	No
3a(i)		X
3a(ii)		X
3b		

b If 'Yes' to 3a(ii), are the related organizations listed as required on Schedule R?

4 Describe in Part XIV the intended uses of the organization's endowment funds

**Part VI Land, Buildings, and Equipment.** See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements	18,695.		5,336.	13,359.
d Equipment	34,663.		25,894.	8,769.
e Other	27,857.		15,977.	11,880.

**Total.** Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c) ) ▶ 34,008.

BAA

Schedule D (Form 990) 2011

**Part VII Investments – Other Securities.** See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other		
(A) -----		
(B) -----		
(C) -----		
(D) -----		
(E) -----		
(F) -----		
(G) -----		
(H) -----		
(I) -----		
Total. (Column (b) must equal Form 990 Part X, column (B) line 12.) ▶		

**Part VIII Investments – Program Related.** See Form 990, Part X, line 13.

(a) Description of investment type	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
Total. (Column (b) must equal Form 990, Part X, column (B) line 13.) ▶		

**Part IX Other Assets.** See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
Total. (Column (b) must equal Form 990, Part X, column (B), line 15.) ▶	

**Part X Other Liabilities.** See Form 990, Part X, line 25.

(a) Description of liability	(b) Book value
(1) Federal income taxes	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
(11)	
Total. (Column (b) must equal Form 990, Part X, column (B) line 25.) ▶	

**2 FIN 48 (ASC 740) Footnote.** In Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740)

**Part XI Reconciliation of Change in Net Assets from Form 990 to Audited Financial Statements**

1	Total revenue (Form 990, Part VIII, column (A), line 12)	40,127,442.
2	Total expenses (Form 990, Part IX, column (A), line 25)	32,164,867.
3	Excess or (deficit) for the year Subtract line 2 from line 1	7,962,575.
4	Net unrealized gains (losses) on investments	-240,056.
5	Donated services and use of facilities	
6	Investment expenses	
7	Prior period adjustments	
8	Other (Describe in Part XIV.)	-55,000.
9	Total adjustments (net) Add lines 4 through 8	-295,056.
10	Excess or (deficit) for the year per audited financial statements. Combine lines 3 and 9	7,667,519.

**Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

1	Total revenue, gains, and other support per audited financial statements	1	39,800,385.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12.		
a	Net unrealized gains on investments	2a	-240,057.
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV.)	2d	
e	Add lines 2a through 2d	2e	-240,057.
3	Subtract line 2e from line 1	3	40,040,442.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV.)	4b	87,000.
c	Add lines 4a and 4b	4c	87,000.
5	Total revenue Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	40,127,442.

**Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

1	Total expenses and losses per audited financial statements	1	32,132,866.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIV.)	2d	54,999.
e	Add lines 2a through 2d	2e	54,999.
3	Subtract line 2e from line 1	3	32,077,867.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV.)	4b	87,000.
c	Add lines 4a and 4b	4c	87,000.
5	Total expenses Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	32,164,867.

**Part XIV Supplemental Information**

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, line 8; Part XII, lines 2d and 4b, and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

Pt XI Line 8 SEP-IRA accrual for book purposes to be included 2012 Form 990

Pt XII Line 4b Legal fee recovery treated as revenue for tax purposes and

Pt XII Line 4b expense reduction for book purposes

Pt XIII Line 2d SEP-IRA accrual for prior period periods for book purposes

Pt XIII Line 2d to be expensed on 2012 Form 990, \$1 rounding adjust.

Pt XIII Line 4b Legal fee recovery treated as revenue for tax purposes and

Pt XIII Line 4b expense reduction for book purposes

**Part XIV** Supplemental Information (continued)

Sch D Pt V L4 The endowment funds are held for use in the programs

Sch D Pt V L4 described in Part III Line 4 of this Form 990

**SCHEDULE I**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**

Complete if the organization answered 'Yes' to Form 990, Part IV, lines 21 or 22.  
▶ Attach to Form 990.

OMB No 1545-0047

**2011**

**Open to Public  
Inspection**

Name of the organization

Donors Trust, Inc.

Employer identification number

52-2166327

**Part I General Information on Grants and Assistance**

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

☒ Yes ☐ No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

**Part II Grants and Other Assistance to Governments and Organizations in the United States.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 21 for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000.  
Part II can be duplicated if additional space is needed ☐

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1) <u>See continuation pages</u>							
(2) _____							
(3) _____							
(4) _____							
(5) _____							
(6) _____							
(7) _____							
(8) _____							

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table

▶ 168

3 Enter total number of other organizations listed in the line 1 table

▶ 0

**BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990.**

TEEA3901 06/01/11

Schedule I (Form 990) (2011)

## Sch I, Grants to Organizations and Individuals in the U S

## Part II, Grants to Organizations and Governments in the U.S.

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
The James Partnership 9302-C Old Keene Mill Road Burke, VA 22015	26-2521115	501(c)(3)	\$24,500 00	N/A	N/A	N/A	for general operations
Independent Women's Forum 1875 I Street, NW Suite 500 Washington, DC 20006	54-1670627	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
State Policy Network 1655 North Fort Myer Drive Suite 360 Arlington, VA 22209-3108	57-0952531	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
911 Families for a Secure America Foundation PO Box 23 Pawling, NY 12564	20-1456278	501(c)(3)	\$7,500 00	N/A	N/A	N/A	for the Police project Underreporting of Crime
American Himalayan Foundation 909 Montgomery St , Suite 400 San Francisco, CA 94133		501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
American University 4400 Massachusetts Avenue, NW Washington, DC 20016-8143	53-0196549	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations
Cato Institute 1000 Massachusetts Avenue, NW Washington, DC 20001-5403	23-7432162	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Cato Institute 1000 Massachusetts Avenue, NW Washington, DC 20001-5403	23-7432162	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S

**Part II, Grants to Organizations and Governments in the U.S.**

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
Claron Fund 255 West 36th Street Suite 800 New York, NY 10018	20-5845679	501(c)(3)	\$100,000 00	N/A	N/A	N/A	for general operations
Commonwealth Foundation for Public Policy Alternative 225 State Street Suite 302 Harrisburg, PA 17101	23-2473845	501(c)(3)	\$100,000 00	N/A	N/A	N/A	for general operations
Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$20,000 00	N/A	N/A	N/A	for general operations
Ethics & Public Policy Center 1730 M Street, NW Suite 910 Washington, DC 20036	52-1162185	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
GMU Foundation (Law & Econ Center) 3301 Fairfax Drive Arlington, VA 22201	54-1603842	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for honorarium for editing and writing papers for a book project entitled "The American Illness"
Heritage Foundation 214 Massachusetts Avenue, NE Washington, DC 20002-4999	23-7327730	501(c)(3)	\$20,000 00	N/A	N/A	N/A	for general operations
Imagination Productions 105 East 34th Street Suite 117 New York, NY 10016	26-1264680	501(c)(3)	\$100,000 00	N/A	N/A	N/A	for general operations



## Sch I, Grants to Organizations and Individuals in the U S

## Part II, Grants to Organizations and Governments in the U.S.

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations
Intercollegiate Studies Institute 3901 Centerville Road Wilmington, DE 19087-1938	23-6050131	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Leadership Institute 1101 North Highland Street Arlington, VA 22201	51-0235174	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations
Leadership Institute 1101 North Highland Street Arlington, VA 22201	51-0235174	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations
Mercatus Center, GMU George Mason University 3351 North Fairfax Drive, 4th Floor Arlington, VA 22201-4433	54-1436224	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for office and development of a new judicial training center
Middle East Media and Research Institute, Inc PO Box 27837 Washington, DC 20038-7837	52-2068483	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
National Committee on American Foreign Policy 320 Park Avenue, 8th FL New York, NY 10022	52-1043767	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
National Right to Work Legal Defense Foundation, Inc 8001 Braddock Road Springfield, VA 22160-0002	59-1588825	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S

## Part II, Grants to Organizations and Governments in the U.S.

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
State Policy Network 1655 North Fort Myer Drive Suite 360 Arlington, VA 22209-3108	57-0952531	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations
World Ort Inc 2152 Ralph Ave , Box 146 Brooklyn, NY 11234	06-1669917	501(c)(3)	\$55,537 00	N/A	N/A	N/A	for general operations
Committee for a Constructive Tomorrow 621 Harvest Court Bel Air, MD 21014	52-1462893	501(c)(3)	\$140,000 00	N/A	N/A	N/A	for general operations
Independent Women's Forum 1875 I Street, NW Suite 500 Washington, DC 20006	54-1670627	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations
Conservative Agenda Project 1025 Thomas Jefferson Street, NW Suite 110 G Washington, DC 20007	26-4029303	501(c)(3)	\$47,000 00	N/A	N/A	N/A	for general operations
Acton Institute 161 Ottawa Avenue NW Suite 301 Grand Rapids, MI 49503-2718	38-2926822	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
American Friends of IEA 1201 L St, NW Washington, DC 20005	54-1899539	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
American Red Cross Oregon Trail Chapter 3131 N Vancouver Avenue Portland, OR 97227		501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S

## Part II, Grants to Organizations and Governments in the U.S.

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
Brookings Institution - Governance Studies Project 1775 Massachusetts Ave , NW, Room 803 Washington, DC 20036	53-0196577	501(c)(3)	\$6,500 00	N/A	N/A	N/A	for Pietro Novola's project, "The Governance Studies Project Will Technology Make the Constitution Obsolete?"
Center for Education Reform 910 17th Street, NW 11th Floor Washington, DC 20006	52-1847187	501(c)(3)	\$75,000 00	N/A	N/A	N/A	for general operations
Citizens in Charge Foundation 2050 Old Bridge Road, Suite 103 Lake Ridge, VA 22192	13-4070270	501(c)(3)	\$75,000 00	N/A	N/A	N/A	for general operations
Claremont Institute 937 West Foothill Boulevard Suite E Claremont, CA 91711	95-3443202	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Commentary, Inc 561 7th Avenue 16th Floor New York, NY 10018-1816	13-3610041	501(c)(3)	\$20,000 00	N/A	N/A	N/A	to promote a set of ideas in the form of a series of articles about how American foreign policy should and could be conducted
Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
Doc Emet Productions, Inc PO Box 339 Lexington, MA 02420	26-2208183	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations
East Harlem Churches & Community Urban Center 325 East 101st Street New York, NY 10029	13-2765924	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S

**Part II, Grants to Organizations and Governments in the U.S.**

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
Empower Texans Foundation	27-1553324	501(c)(3)	\$37,000 00	N/A	N/A	N/A	for general operations
Fix the Facts Foundation PO Box 303454 Austin, TX 78703	27-1365206	501(c)(3)	\$162,500 00	N/A	N/A	N/A	for general operations
Foundation for Cultural Review 900 Broadway Suite 602 New York, NY 10003	13-3108424	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for The New Criterion's budget for Technology and Culture Special Section in its 30th anniversary season
Franklin Center 1229 King Street 3rd Floor Alexandria, VA 22314	26-4066298	501(c)(3)	\$110,000 00	N/A	N/A	N/A	for general operations
Freedom Works Foundation 400 North Capitol Street, NW Suite 765 Washington, DC 20001-1564	52-1526916	501(c)(3)	\$100,000 00	N/A	N/A	N/A	for Diverse Tea and Kosher Tea
GMU Foundation (Law & Econ Center) 3301 Fairfax Drive Arlington, VA 22201	54-1603842	501(c)(3)	\$30,000 00	N/A	N/A	N/A	for honoraria for a book project entitled "The American Illness"
Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations and pairs of George Orwell's Animal Farm and 1984 as supplementary reading
International Policy Network US, Inc 214 Massachusetts Avenue, NE Washington, DC 20002	52-2363626	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for the benefit of Network for a Free Society

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Johns Hopkins University 600 N Wolfe Street - Dept of Neurosurgery - Meyer Bldg, Room 7-113 Baltimore, MD 21287	52-0595110	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for Dr Henry Brem's research
Museum of the Rockies 600 West Kagy Boulevard Bozeman, MT 59717	81-6016828	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for the work of Dr Jack Homer and his students
National Affairs, Inc 1730 M Street NW, Suite 910 Washington, DC 20036	13-6207054	501(c)(3)	\$30,000 00	N/A	N/A	N/A	for a series of essays for a book to propose an agenda for new Congress and to host gathering for members of Congress
New Oxford Review 1069 Kains Ave Berkeley, CA 94706	94-2915957	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
New York Historical Society 170 Central Park West New York, NY 10024	13-1624124	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for Chairman's Council
NRA Freedom Action Foundation 11250 Waples Mill Road Fairfax, VA 22030	26-1277941	501(c)(3)	\$100,000 00	N/A	N/A	N/A	for general operations
Pacific Research Institute for Public Policy One Embarcadero Center Suite 350 San Francisco, CA 94111	94-2528433	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Student Achievement and Advocacy Services 1511 16th Street #101 Santa Monica, CA 90404-3347	52-2237872	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations

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Student Achievement and Advocacy Services 1511 16th Street #101 Santa Monica, CA 90404-3347	52-2237872	501(c)(3)	\$5,000 00	N/A	N/A	N/A	to support Dr Mark Moffett's work and research at his direction
Wakefield School PO Box 107 The Plains, VA 20198	54-1096344	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
Freedom Works Foundation 400 North Capitol Street, NW Suite 765 Washington, DC 20001-1564	52-1526916	501(c)(3)	\$167,000 00	N/A	N/A	N/A	for general operations
Bill of Rights Institute 200 North Glebe Road Suite 200 Arlington, VA 22203	48-0891418	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for special event sponsorship
Media Research Center 325 South Patnck Street Alexandria, VA 22314	54-1429009	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for special event sponsorship
John Hancock Committee for the States 3509 Connecticut Ave NW, Suite 260 Washington, DC 20008	27-1657203	501(c)(3)	\$40,000 00	N/A	N/A	N/A	for general operations
Independent Women's Forum 1875 I Street, NW Suite 500 Washington, DC 20006	54-1670627	501(c)(3)	\$100,000 00	N/A	N/A	N/A	for general operations
Citizens Against Government Waste 1301 Connecticut Avenue, NW, Suite 400 Washington, DC 20036	52-1363952	501(c)(3)	\$1,500,000 00	N/A	N/A	N/A	for general operations

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Acton Institute 161 Ottawa Avenue NW Suite 301 Grand Rapids, MI 49503-2718	38-2926822	501(c)(3)	\$250 00	N/A	N/A	N/A	for general operations
American Enterprise Institute 1150 Seventeenth Street, NW Washington, DC 20036	53-0218495	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for the Center for Defense Studies
American Enterprise Institute 1150 Seventeenth Street, NW Washington, DC 20036	53-0218495	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for Sally Satel's work
American Spectator Foundation 1611 North Kent Street Suite 901 Arlington, VA 22209-2111	23-7002632	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for promotional efforts for the magazine
Association of Northwest Steelheaders 9829 Kilchis River Road Tillamook, OR 97141	93-0816862	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
Boston College 200 McGuinn Hall, Boston College 140 Commonwealth Avenue Chestnut Hill, MA 02467	04-2103545	501(c)(3)	\$65,000 00	N/A	N/A	N/A	for the establishment of a JMC-Ventas Higher Education Initiative Post-Doctoral Fellowship
Cato Institute 1000 Massachusetts Avenue, NW Washington, DC 20001-5403	23-7432162	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Cato Institute 1000 Massachusetts Avenue, NW Washington, DC 20001-5403	23-7432162	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations

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Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Discovery Institute 1511 Third Avenue, Suite 808 Seattle, WA 98101	91-1521697	501(c)(3)	\$250,000 00	N/A	N/A	N/A	for general operations
Education Action Group Foundation 801 West Norton Avenue Suite 1 Muskegon, MI 49441	26-0877115	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
Empower Texans Foundation	27-1553324	501(c)(3)	\$18,500 00	N/A	N/A	N/A	for general operations
Freedom Works Foundation 400 North Capitol Street, NW Suite 765 Washington, DC 20001-1564	52-1526916	501(c)(3)	\$100,000 00	N/A	N/A	N/A	for general operations
Freedom Works Foundation 400 North Capitol Street, NW Suite 765 Washington, DC 20001-1564	52-1526916	501(c)(3)	\$166,000 00	N/A	N/A	N/A	for general operations
Georgetown University Tocqueville Forum 3240 Prospect St NW, Third Floor Washington, DC 20007	53-0196603	501(c)(3)	\$65,000 00	N/A	N/A	N/A	for the establishment of a JMC-Ventas Higher Education Initiative Post-Doctoral Fellowship
GMU Foundation (Law & Econ Center) 3301 Fairfax Dnve Arlington, VA 22201	54-1603842	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for honoraria for a book project entitled "The American Illness"



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Hentage Foundation 214 Massachusetts Avenue, NE Washington, DC 20002-4999	23-7327730	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Hentage Foundation 214 Massachusetts Avenue, NE Washington, DC 20002-4999	23-7327730	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Hentage Foundation 214 Massachusetts Avenue, NE Washington, DC 20002-4999	23-7327730	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for the William H. Donner Foundation conference room
Hudson Institute 1015 15th Street, NW 6th Floor Washington, DC 20005-2705	13-1945157	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
Independent Women's Forum 1875 I Street, NW Suite 500 Washington, DC 20006	54-1670627	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations
Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations
Institute for Humane Studies 3301 North Fairfax Dnve Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations

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Institute of World Politics 1521 16th Street, NW Washington, DC 20036	52-1699641	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for general operations
John Hancock Committee for the States 3509 Connecticut Ave NW, Suite 260 Washington, DC 20008	27-1657203	501(c)(3)	\$40,000 00	N/A	N/A	N/A	for general operations
Judicial Watch 425 Third Street, SW Suite 800 Washington, DC 20024	52-1885088	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, NY 10017	13-2912529	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for program for luncheon speakers
Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, NY 10017	13-2912529	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for the Annual Hamilton Dinner in NYC on April 27
Mercatus Center, GMU George Mason University 3351 North Fairfax Drive, 4th Floor Arlington, VA 22201-4433	54-1436224	501(c)(3)	\$250,000 00	N/A	N/A	N/A	for the State Budget Initiative
Mountain States Legal Foundation 2596 South Lewis Way Lakewood, CO 80227	84-0736725	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
New York Historical Society 170 Central Park West New York, NY 10024	13-1624124	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for Chairman's Circle

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Philanthropy Roundtable 1730 M Street, NW Suite 601 Washington, DC 20036	13-2943020	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations
State Policy Network 1655 North Fort Myer Drive Suite 360 Arlington, VA 22209-3108	57-0952531	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
University of Notre Dame 110 Grace Hall Tocqueville Center, University of Notre Dame Notre Dame, IN 46556	35-0868188	501(c)(3)	\$65,000 00	N/A	N/A	N/A	for the establishment of a JMC-Ventas Higher Education Initiative Post-Doctoral Fellowship
University of Texas - Austin 1 University Station C4100 Austin, TX 78712	74-6000203	501(c)(3)	\$65,000 00	N/A	N/A	N/A	for the establishment of a JMC-Ventas Higher Education Initiative Post-Doctoral Fellowship
University of Virginia Foundation Dept of Politics, University of Virginia 232 Cabell Hall, PO Box 400787 Charlottesville, VA 22904-4787	54-1682176	501(c)(3)	\$65,000 00	N/A	N/A	N/A	for the establishment of a JMC-Ventas Higher Education Initiative Post-Doctoral Fellowship
Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$55,000 00	N/A	N/A	N/A	for general operations
Pegasus NK 60 Plaza Street East, Apt 4C Brooklyn, NY 11238	26-4381061	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for the work of Robert Gupta
Citizens Against Government Waste 1301 Connecticut Avenue, NW, Suite 400 Washington, DC 20036	52-1363952	501(c)(3)	\$1,500,000 00	N/A	N/A	N/A	for general operations

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Citizens Against Government Waste 1301 Connecticut Avenue, NW, Suite 400 Washington, DC 20036	52-1363952	501(c)(3)	\$500,000 00	N/A	N/A	N/A	for general operations
The James Partnership 9302-C Old Keene Mill Road Burke, VA 22015	26-2521115	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations
Americans for Prosperity Foundation 2111 Wilson Boulevard Suite 350 Arlington, VA 22201-3097	52-1527294	501(c)(3)	\$100,000 00	N/A	N/A	N/A	for Right On Line
Clare Boothe Luce Policy Institute 112 Elden Street Suite P Herndon, VA 20170	54-1672138	501(c)(3)	\$4,000 00	N/A	N/A	N/A	for general operations
Freedom Foundation PO Box 522 Olympia, WA 98507-0522	94-3136961	501(c)(3)	\$3,500 00	N/A	N/A	N/A	for general operations
Independence Institute 727 East 16th Avenue Denver, CO 80203	84-0990300	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
International Policy Network US, Inc 214 Massachusetts Avenue, NE Washington, DC 20002	52-2363626	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations

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James Madison Institute for Public Policy The Columns 100 North Duval Street Tallahassee, FL 32301	59-2811908	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Media Research Center 325 South Patrick Street Alexandria, VA 22314	54-1429009	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
State Policy Network 1655 North Fort Myer Drive Suite 360 Arlington, VA 22209-3108	57-0952531	501(c)(3)	\$2,000 00	N/A	N/A	N/A	for general operations
Young America's Foundation 110 Elden Street Herndon, VA 20170-4891	23-7042029	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Young America's Foundation 110 Elden Street Herndon, VA 20170-4891	23-7042029	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for maintaining Reagan's Ranch
James Madison Institute for Public Policy The Columns 100 North Duval Street Tallahassee, FL 32301	59-2811908	501(c)(3)	\$12,742 19	N/A	N/A	N/A	for general operations
Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, NY 10017	13-2912529	501(c)(3)	\$1,000 00	N/A	N/A	N/A	In memory of Mabel Weil
National Dance Institute Center for Learning & the Arts 217 West 147th Street New York, NY 10039	13-2890779	501(c)(3)	\$50,000 00	N/A	N/A	N/A	In memory of Mabel S. Weil

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Donors Capital Fund PO Box 1305 Alexandria, VA 22313	54-1934032	501(c)(3)	\$8,936.63	N/A	N/A	N/A	for a donor-advised fund
American University 4400 Massachusetts Avenue, NW Washington, DC 20016-8143	53-0196549	501(c)(3)	\$20,000.00	N/A	N/A	N/A	for the political theory colloquium under the direction of Professors Alan Levine and Thomas Merrill
Atlas Economic Research Foundation 1201 L Street, NW 2nd Floor Washington, DC 20005	94-2763845	501(c)(3)	\$5,000.00	N/A	N/A	N/A	for general operations
Carthage College Dept of Political Science 2001 Alford Park Dr , Lentz Hall 417B Kenosha, WI 53140	37-0661496	501(c)(3)	\$50,000.00	N/A	N/A	N/A	for JMC-Ventas Post-Doctoral Fellowships in the Western Heritage Program
NFIB Legal Foundation 1201 F Street, NW Suite 200 Washington, DC 20004	62-1570449	501(c)(3)	\$200,000.00	N/A	N/A	N/A	for general operations
Rhodes College Department of Political Science 2000 N Parkway Memphis, TN 38112	62-0476301	501(c)(3)	\$25,000.00	N/A	N/A	N/A	for JMC-Ventas Post-Doctoral Fellowships in the Project for the Study of Liberal Democracy
University of Richmond 28 Westhampton Way Richmond, VA 23173		501(c)(3)	\$30,000.00	N/A	N/A	N/A	for the Adam Smith Program under the direction of Dean Sandra Peart
Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, NY 10017	13-2912529	501(c)(3)	\$50,000.00	N/A	N/A	N/A	in memory of Mabel S. Weil

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Citizens Against Government Waste 1301 Connecticut Avenue, NW, Suite 400 Washington, DC 20036	52-1363952	501(c)(3)	\$150,000 00	N/A	N/A	N/A	for general operations
Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for special event sponsorship
John Hancock Committee for the States 3509 Connecticut Ave NW, Suite 260 Washington, DC 20008	27-1657203	501(c)(3)	\$40,000 00	N/A	N/A	N/A	for general operations
Acton Institute 161 Ottawa Avenue NW Suite 301 Grand Rapids, MI 49503-2718	38-2926822	501(c)(3)	\$1,800 00	N/A	N/A	N/A	for Acton University
American Friends of Oxford House 1611 N Kent Street #901 Arlington, VA 22209	27-3368056	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations
American Majority PO Box 87 Purcellville, VA 20134	26-1501154	501(c)(3)	\$98,950 00	N/A	N/A	N/A	for general operations
David Horowitz Freedom Center PO Box 55089 Sherman Oaks, CA 91499-1964	95-4194642	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Hentage Foundation 214 Massachusetts Avenue, NE Washington, DC 20002-4999	23-7327730	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations

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John Hancock Committee for the States 3509 Connecticut Ave NW, Suite 260 Washington, DC 20008	27-1657203	501(c)(3)	\$40,000 00	N/A	N/A	N/A	for general operations
Media Research Center 325 South Patrick Street Alexandria, VA 22314	54-1429009	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
American Enterprise Institute 1150 Seventeenth Street, NW Washington, DC 20036	53-0218495	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for special event sponsorship
Fund for American Studies 1706 New Hampshire Avenue, NW Suite 400 Washington, DC 20009	13-6223604	501(c)(3)	\$2,000 00	N/A	N/A	N/A	for special event sponsorship
Sam Adams Alliance 400 West Erie, Suite #407 Chicago, IL 60654-6912	20-5792227	501(c)(3)	\$1,500 00	N/A	N/A	N/A	for general operations
Ethics & Public Policy Center 1730 M Street, NW Suite 910 Washington, DC 20036	52-1162185	501(c)(3)	\$20,000 00	N/A	N/A	N/A	for general operations
American Enterprise Institute 1150 Seventeenth Street, NW Washington, DC 20036	53-0218495	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
American Spectator Foundation 1611 North Kent Street Suite 901 Arlington, VA 22209-2111	23-7002632	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations



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Berkshire School	04-2121313	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for Annual Fund (\$5,000) and Meyers Fund (\$5,000)
Brown University - Political Theory Project PO Box 1844 Providence, RI 02912	05-0258809	501(c)(3)	\$65,000 00	N/A	N/A	N/A	for the Political Theory Project at Brown University under the direction of Professor John Tomasi
Claremont Institute 937 West Foothill Boulevard Suite E Claremont, CA 91711	95-3443202	501(c)(3)	\$39,650 00	N/A	N/A	N/A	for the Claremont Review of Books "The New Politics of the Constitution" - a Conference Proposal
College of the Holy Cross Department of Political Science PO Box 121A, 1 College Street Worcester, MA 01610	04-2103558	501(c)(3)	\$75,000 00	N/A	N/A	N/A	for the benefit of the Charles Carroll Program at the College of the Holy Cross
Cornell University Mcgraw Hall, Room 324 Ithaca, NY 14853	15-0532082	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for the Program on the Foundations of Free Societies
Empower Texans Foundation	27-1553324	501(c)(3)	\$18,500 00	N/A	N/A	N/A	for general operations
Ethics & Public Policy Center 1730 M Street, NW Suite 910 Washington, DC 20036	52-1162185	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for the support of Jim Bouman and for the support of his film program
Fund for American Studies 1706 New Hampshire Avenue, NW Suite 400 Washington, DC 20009	13-6223604	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for scholarship and general funds

## Sch I, Grants to Organizations and Individuals in the U S

## Part II, Grants to Organizations and Governments in the U.S.

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
Gettysburg College Weidensall Hall 300 North Washington Street Gettysburg, PA 17325-1485	23-1352641	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for the benefit of the Civil War Era Studies Program at Gettysburg College
Hudson Institute 1015 15th Street, NW 6th Floor Washington, DC 20005-2705	13-1945157	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for the support of Martin Wooster
Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, NY 10017	13-2912529	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for Standpoint magazine of the Social Affairs Unit
Pegasus NK 60 Plaza Street East, Apt 4C Brooklyn, NY 11238	26-4381061	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Pioneer Institute for Public Policy Research 85 Devonshire Street 8th Floor Boston, MA 02109-3501	22-2632081	501(c)(3)	\$3,000 00	N/A	N/A	N/A	for general operations
School Performance, Inc 915 Broadway, Ste 110 Albany, NY 12207	84-1668293	501(c)(3)	\$144,715 00	N/A	N/A	N/A	for general operations
Conservative Agenda Project 1025 Thomas Jefferson Street, NW Suite 110 G Washington, DC 20007	26-4029303	501(c)(3)	\$46,000 00	N/A	N/A	N/A	for general operations
American Action Forum 1401 New York Avenue, NW Suite 1200 Washington, DC 20005	27-0567765	501(c)(3)	\$80,000 00	N/A	N/A	N/A	for general operations

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Center for Individual Rights 1233 20th Street, NW Suite 300 Washington, DC 20036-1609	52-1600481	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Commonwealth Foundation for Public Policy Alternative 225 State Street Suite 302 Harrisburg, PA 17101	23-2473845	501(c)(3)	\$40,000 00	N/A	N/A	N/A	for general operations
Commonwealth Foundation for Public Policy Alternative 225 State Street Suite 302 Harrisburg, PA 17101	23-2473845	501(c)(3)	\$40,000 00	N/A	N/A	N/A	for general operations
Pacific Research Institute for Public Policy One Embarcadero Center Suite 350 San Francisco, CA 94111	94-2528433	501(c)(3)	\$75,000 00	N/A	N/A	N/A	for general operations
Committee for a Constructive Tomorrow 621 Harvest Court Bel Air, MD 21014	52-1462893	501(c)(3)	\$250,000 00	N/A	N/A	N/A	for general operations
Philanthropy Roundtable 1730 M Street, NW Suite 601 Washington, DC 20036	13-2943020	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
The James Partnership 9302-C Old Keene Mill Road Burke, VA 22015	26-2521115	501(c)(3)	\$24,500 00	N/A	N/A	N/A	for general operations
Acton Institute 161 Ottawa Avenue NW Suite 301 Grand Rapids, MI 49503-2718	38-2926822	501(c)(3)	\$2,000 00	N/A	N/A	N/A	for general operations

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Americans for Prosperity Foundation 2111 Wilson Boulevard Suite 350 Arlington, VA 22201-3097	52-1527294	501(c)(3)	\$50,800 00	N/A	N/A	N/A	for Americans for Prosperity - Pennsylvania chapter
Center for Individual Rights 1233 20th Street, NW Suite 300 Washington, DC 20036-1609	52-1600481	501(c)(3)	\$75,000 00	N/A	N/A	N/A	for general operations
Claremont McKenna College Salvator Center 850 Columbia Avenue Claremont, CA 91711	95-1664101	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for the JMC-Ventas Post- Doctoral Fellowship at the Henry Salvator Center
Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$55,000 00	N/A	N/A	N/A	for general operations
Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$75,000 00	N/A	N/A	N/A	for general operations
Discovery Community Church P O Box 111840 Tacoma, WA 98411		501(c)(3)	\$20,000 00	N/A	N/A	N/A	for general operations
Empower Texans Foundation	27-1553324	501(c)(3)	\$18,500 00	N/A	N/A	N/A	for general operations
Families Against Mandatory Minimums Foundation 1100 H Street, NW Suite 1000 Washington, DC 20005	52-1750246	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations

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Federalist Society 1015 18th Street, NW Suite 425 Washington, DC 20036-5221	36-3235550	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations
Federalist Society 1015 18th Street, NW Suite 425 Washington, DC 20036-5221	36-3235550	501(c)(3)	\$300,000 00	N/A	N/A	N/A	for general operations
Free To Choose Network, Inc 2002 Filmore Avenue Suite 1 Ene, PA 16506	52-1455677	501(c)(3)	\$150,000 00	N/A	N/A	N/A	for general operations
Grassroot Institute of Hawaii 1314 South King Street Suite 1163 Honolulu, HI 96814	99-0354937	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for Rail Law Suit
Immaculate Heart Radio 3256 Penryn Road, Suite 100 Loomis, CA 95650		501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$150,000 00	N/A	N/A	N/A	for general operations
Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$2,000 00	N/A	N/A	N/A	for general operations
John Hancock Committee for the States 3509 Connecticut Ave NW, Suite 260 Washington, DC 20008	27-1657203	501(c)(3)	\$80,000 00	N/A	N/A	N/A	for general operations

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Moving Picture Institute 375 Greenwich Street New York, NY 10013	20-3237801	501(c)(3)	\$50,000 00	N/A	N/A	N/A	for Bob Bowden's promoting school choice via MPI
National Legal & Policy Center 107 Park Washington Court Falls Church, VA 22046	52-1750188	501(c)(3)	\$2,000 00	N/A	N/A	N/A	for general operations
NFIB Legal Foundation 1201 F Street, NW Suite 200 Washington, DC 20004	62-1570449	501(c)(3)	\$250,000 00	N/A	N/A	N/A	for general operations
Pacific Research Institute for Public Policy One Embarcadero Center Suite 350 San Francisco, CA 94111	94-2528433	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Patrick Henry Center for Individual Liberty 10611 Balls Ford Road #120 Manassas, VA 20109	54-1865661	501(c)(3)	\$30,000 00	N/A	N/A	N/A	for general operations
Reason Foundation 3415 South Sepulveda Boulevard Suite 400 Los Angeles, CA 90034-6014	95-3298239	501(c)(3)	\$200,000 00	N/A	N/A	N/A	for general operations
Ryan Foundation Villanova University, Old Falvey 304 800 Lancaster Avenue Villanova, PA 19085	41-3169151	501(c)(3)	\$50,000 00	N/A	N/A	N/A	fbo Ryan Foundation in support of the Matthew J Ryan Center for the Study of Free Institutions and the Public Good
Americans for Prosperity Foundation 2111 Wilson Boulevard Suite 350 Arlington, VA 22201-3097	52-1527294	501(c)(3)	\$49,600 00	N/A	N/A	N/A	for Americans for Prosperity Foundation - Pennsylvania chapter

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Atlas Economic Research Foundation 1201 L Street, NW 2nd Floor Washington, DC 20005	94-2763845	501(c)(3)	\$1,000 00	N/A	N/A	N/A	in response to the annual appeal
Brookings Institution - Governance Studies Project 1775 Massachusetts Ave , NW, Room 803 Washington, DC 20036	53-0196577	501(c)(3)	\$7,950 00	N/A	N/A	N/A	for Stuart Taylor book project - overhead expenses
Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$1,500 00	N/A	N/A	N/A	for general operations
Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for special event sponsorship
Freedom Works Foundation 400 North Capitol Street, NW Suite 765 Washington, DC 20001-1564	52-1526916	501(c)(3)	\$1,000 00	N/A	N/A	N/A	in response to the "Now We Must Govern" campaign
Fund for American Studies 1706 New Hampshire Avenue, NW Suite 400 Washington, DC 20009	13-6223604	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
Hudson Institute 1015 15th Street, NW 6th Floor Washington, DC 20005-2705	13-1945157	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for Doolittle Prize Dinner Table
Illinois Policy Institute 190 South LaSalle Street Suite 1630 Chicago, IL 60603	41-2057028	501(c)(3)	\$7,500 00	N/A	N/A	N/A	for general operations

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Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$1,000 00	N/A	N/A	N/A	in response to the annual appeal
Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Media Research Center 325 South Patrick Street Alexandria, VA 22314	54-1429009	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for the annual trustee drive
National Center for Public Policy Research, Inc 501 Capitol Court, NE Suite 200 Washington, DC 20002	52-1226614	501(c)(3)	\$1,000 00	N/A	N/A	N/A	in response to the 2011 Shareholder Activism Campaign (2:1 matching) for the Free Enterprise Project
National Legal & Policy Center 107 Park Washington Court Falls Church, VA 22046	52-1750188	501(c)(3)	\$1,250 00	N/A	N/A	N/A	for general operations
National Right to Work Legal Defense Foundation, Inc 8001 Braddock Road Springfield, VA 22160-0002	59-1588825	501(c)(3)	\$2,000 00	N/A	N/A	N/A	for general operations
PEF - Israel Endowment Fund Shurat Hadin c/o PEF 317 Madison Ave., Suite 607 New York, NY 10017	13-6104086	501(c)(3)	\$100,000 00	N/A	N/A	N/A	for general operations
State Policy Network 1655 North Fort Myer Drive Suite 360 Arlington, VA 22209-3108	57-0952531	501(c)(3)	\$1,000 00	N/A	N/A	N/A	in response to the Restore America's Future appeal



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American Council on Science & Health 1995 Broadway, 2nd Floor New York, NY 10023-5860	13-2911127	501(c)(3)	\$99,007 62	N/A	N/A	N/A	for general operations
Americans for Prosperity Foundation 2111 Wilson Boulevard Suite 350 Arlington, VA 22201-3097	52-1527294	501(c)(3)	\$50,000 00	N/A	N/A	N/A	for general operations
Citizens in Charge Foundation 2050 Old Bridge Road, Suite 103 Lake Ridge, VA 22192	13-4070270	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations
Clare Boothe Luce Policy Institute 112 Elden Street Suite P Herndon, VA 20170	54-1672138	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
Clanion Fund 255 West 36th Street Suite 800 New York, NY 10018	20-5845679	501(c)(3)	\$125,000 00	N/A	N/A	N/A	for general operations
Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
Danish American Society One Dag Hammarskjolds Plaza, 885 2nd Avenue 18th Floor New York, NY 10017	13-6167958	501(c)(3)	\$7,000 00	N/A	N/A	N/A	for a dinner sponsorship
Imagination Productions 105 East 34th Street Suite 117 New York, NY 10016	26-1264680	501(c)(3)	\$125,000 00	N/A	N/A	N/A	for general operations

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Independence Institute 727 East 16th Avenue Denver, CO 80203	84-0990300	501(c)(3)	\$100,000 00	N/A	N/A	N/A	for general operations
Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, NY 10017	13-2912529	501(c)(3)	\$30,000 00	N/A	N/A	N/A	for City Journal's story ideas (Tracking California's Jobs, Firms and Economic Growth )
Manjuana Policy Project Foundation PO Box 77492 Washington, DC 20013	52-1975211	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations
National Center for Public Policy Research, Inc 501 Capitol Court, NE Suite 200 Washington, DC 20002	52-1226614	501(c)(3)	\$35,000 00	N/A	N/A	N/A	for general operations
Witherspoon Institute 16 Stockton Street Princeton, NJ 08540	55-0835528	501(c)(3)	\$125,000 00	N/A	N/A	N/A	to support Jennifer Bryson's work on Islam and Civil Society
Student Free Press Association P O Box 1996 Woodbridge, VA 22195	#N/A	501(c)(3)	\$100,000 00	N/A	N/A	N/A	for general operations
Student Free Press Association P O Box 1996 Woodbridge, VA 22195	#N/A	501(c)(3)	\$96,903 14	N/A	N/A	N/A	for general operations
Americans for Prosperity Foundation 2111 Wilson Boulevard Suite 350 Arlington, VA 22201-3097	52-1527294	501(c)(3)	\$16,800 00	N/A	N/A	N/A	for general operations

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Catalogue for Philanthropy 124 Watertown Street Suite 3B Watertown, MA 02472	16-1645596	501(c)(3)	\$26,050 00	N/A	N/A	N/A	for the Non-Profit Typology Project
Committee for a Constructive Tomorrow 621 Harvest Court Bel Air, MD 21014	52-1462893	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for the CFACT Environmental project
Freedom Works Foundation 400 North Capitol Street, NW Suite 765 Washington, DC 20001-1564	52-1526916	501(c)(3)	\$148,923 00	N/A	N/A	N/A	for general operations
The James Partnership 9302-C Old Keene Mill Road Burke, VA 22015	26-2521115	501(c)(3)	\$50,000 00	N/A	N/A	N/A	for general operations
Americans for Prosperity Foundation 2111 Wilson Boulevard Suite 350 Arlington, VA 22201-3097	52-1527294	501(c)(3)	\$150,000 00	N/A	N/A	N/A	for pronty projects
Yankee Institute 800 Connecticut Boulevard Suite 302 East Hartford, CT 06108	52-1358144	501(c)(3)	\$30,000 00	N/A	N/A	N/A	for general operations
Americans for Oxford University of Oxford North American Office 500 Fifth Avenue, 32nd Floor New York, NY 10110	52-1495060	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for Isabel Behncke's research in the Oxford Anthropology Department
Americans for Prosperity Foundation 2111 Wilson Boulevard Suite 350 Arlington, VA 22201-3097	52-1527294	501(c)(3)	\$16,600 00	N/A	N/A	N/A	for general operations

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Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$36,000 00	N/A	N/A	N/A	for general operations
Federalist Society 1015 18th Street, NW Suite 425 Washington, DC 20036-5221	36-3235550	501(c)(3)	\$40,000 00	N/A	N/A	N/A	for general operations
Free To Choose Network, Inc 2002 Filmore Avenue Suite 1 Ene, PA 16506	52-1455677	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for the Don Boudreaux Book Project
Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
National Center for Science Education, Inc 420 40th Street, Suite 2 Oakland, CA 94609-2509	11-2656357	501(c)(3)	\$6,000 00	N/A	N/A	N/A	for general operations
National Right to Work Legal Defense Foundation, Inc 8001 Braddock Road Springfield, VA 22160-0002	59-1588825	501(c)(3)	\$35,000 00	N/A	N/A	N/A	for general operations
NFIB Legal Foundation 1201 F Street, NW Suite 200 Washington, DC 20004	62-1570449	501(c)(3)	\$80,000 00	N/A	N/A	N/A	for general operations
Teneo Inc 1015 18th Street, NW Suite 425 Washington, DC 20036	80-0305723	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations

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Center for Education Reform 910 17th Street, NW 11th Floor Washington, DC 20006	52-1847187	501(c)(3)	\$4,000 00	N/A	N/A	N/A	for general operations
David Horowitz Freedom Center PO Box 55089 Sherman Oaks, CA 91499-1964	95-4194642	501(c)(3)	\$50,000 00	N/A	N/A	N/A	for general operations
Empower Texans Foundation	27-1553324	501(c)(3)	\$18,500 00	N/A	N/A	N/A	for general operations
Grassroot Institute of Hawaii 1314 South King Street Suite 1163 Honolulu, HI 96814	99-0354937	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
John Hancock Committee for the States 3509 Connecticut Ave NW, Suite 260 Washington, DC 20008	27-1657203	501(c)(3)	\$80,000 00	N/A	N/A	N/A	for general operations
Ministry Services Group 11625 Rainwater Drive, NE Suite 500 Alpharetta, GA 30009	01-0654014	501(c)(3)	\$50,000 00	N/A	N/A	N/A	for general operations
National Legal & Policy Center 107 Park Washington Court Falls Church, VA 22046	52-1750188	501(c)(3)	\$1,250 00	N/A	N/A	N/A	for general operations
Shnners Hospitals for Children PO Box 31356 Tampa, FL 33631	36-2193608	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations

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American Majority PO Box 87 Purcellville, VA 20134	26-1501154	501(c)(3)	\$50,000 00	N/A	N/A	N/A	for general operations
Center for Education Reform 910 17th Street, NW 11th Floor Washington, DC 20006	52-1847187	501(c)(3)	\$4,000 00	N/A	N/A	N/A	for general operations
Freedom Foundation PO Box 522 Olympia, WA 98507-0522	94-3136961	501(c)(3)	\$3,000 00	N/A	N/A	N/A	for general operations
Institute for the Study of War Inc 1400 16th Street, NW Suite 515 Washington, DC 20036	26-0273675	501(c)(3)	\$495,055 91	N/A	N/A	N/A	for general operations
Institute of World Politics 1521 16th Street, NW Washington, DC 20036	52-1699641	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for general operations
Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, NY 10017	13-2912529	501(c)(3)	\$39,000 00	N/A	N/A	N/A	for Standpoint Magazine of the Social Affairs Unit in support of Chnstopher Caldwell's essays
NFIB Legal Foundation 1201 F Street, NW Suite 200 Washington, DC 20004	62-1570449	501(c)(3)	\$300,000 00	N/A	N/A	N/A	for general operations
Student Free Press Association P O Box 1996 Woodbridge, VA 22195	27-2277658	501(c)(3)	\$165,600 00	N/A	N/A	N/A	for 7,200 National Review subscriptions

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**Part II, Grants to Organizations and Governments in the U.S.**

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Utah State University Old Main 26 Logan, UT 84322-2400		501(c)(3)	\$30,000 00	N/A	N/A	N/A	for the benefit of the Project on Liberty and American Constitutionalism
Acton Institute 161 Ottawa Avenue NW Suite 301 Grand Rapids, MI 49503-2718	38-2926822	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
American Majority PO Box 87 Purcellville, VA 20134	26-1501154	501(c)(3)	\$135,580 00	N/A	N/A	N/A	for general operations
Duke University PO Box 90204 Durham, NC 27708	56-0532129	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for the benefit of the Program in American Values and Institutions
Heritage Foundation 214 Massachusetts Avenue, NE Washington, DC 20002-4999	23-7327730	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
John Adams Center c/o Brigham Young University, 750 SWKT Provo, UT 84602	27-0151485	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
Philanthropy Roundtable 1730 M Street, NW Suite 601 Washington, DC 20036	13-2943020	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S

## Part II, Grants to Organizations and Governments in the U.S.

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
Pioneer Institute for Public Policy Research 85 Devonshire Street 8th Floor Boston, MA 02109-3501	22-2632081	501(c)(3)	\$5,000 00	N/A	N/A	N/A	in memory of Lovett C. Peters
Texas Public Policy Foundation 900 Congress Avenue Suite 400 Austin, TX 78701	74-2524057	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
Students for Liberty PO Box 17321 Arlington, VA 22216-7321	94-3435899	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for Charity Poker Tournament Sponsorship
Americans for Prosperity Foundation 2111 Wilson Boulevard Suite 350 Arlington, VA 22201-3097	52-1527294	501(c)(3)	\$16,600 00	N/A	N/A	N/A	for Pennsylvania AFP chapter
Americans for Prosperity Foundation 2111 Wilson Boulevard Suite 350 Arlington, VA 22201-3097	52-1527294	501(c)(3)	\$16,800 00	N/A	N/A	N/A	for Pennsylvania AFP chapter
Cato Institute 1000 Massachusetts Avenue, NW Washington, DC 20001-5403	23-7432162	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Foundation for Cultural Review 900 Broadway Suite 602 New York, NY 10003	13-3108424	501(c)(3)	\$10,000 00	N/A	N/A	N/A	to support articles and books on conservative themes
Fund for American Studies 1706 New Hampshire Avenue, NW Suite 400 Washington, DC 20009	13-6223604	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations



## Sch I, Grants to Organizations and Individuals in the U S

## Part II, Grants to Organizations and Governments in the U.S.

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Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$2,000 00	N/A	N/A	N/A	for general operations
Network for Teaching Entrepreneurship	13-3408731	501(c)(3)	\$55,000 00	N/A	N/A	N/A	for general operations
NFIB Legal Foundation 1201 F Street, NW Suite 200 Washington, DC 20004	62-1570449	501(c)(3)	\$60,000 00	N/A	N/A	N/A	for general operations
Reason Foundation 3415 South Sepulveda Boulevard Suite 400 Los Angeles, CA 90034-6014	95-3298239	501(c)(3)	\$90,000 00	N/A	N/A	N/A	for general operations
Rockefeller University 1230 York Avenue New York, NY 10021	13-1624158	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
State Policy Network 1655 North Fort Myer Drive Suite 360 Arlington, VA 22209-3108	57-0952531	501(c)(3)	\$2,000 00	N/A	N/A	N/A	for general operations
Yankee Institute 800 Connecticut Boulevard Suite 302 East Hartford, CT 06108	52-1358144	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U.S.

## Part II, Grants to Organizations and Governments in the U.S.

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Loyola University of Chicago 1032 W Shendan Road, #319 Chicago, IL 60660	36-1408475	501(c)(3)	\$20,000 00	N/A	N/A	N/A	for the David Hume Forum
Independent Women's Forum 1875 I Street, NW Suite 500 Washington, DC 20006	54-1670627	501(c)(3)	\$154,154 23	N/A	N/A	N/A	for general operations
Sam Adams Alliance 400 West Erie, Suite #407 Chicago, IL 60654-6912	20-5792227	501(c)(3)	\$50,000 00	N/A	N/A	N/A	for general operations
Atlas Economic Research Foundation 1201 L Street, NW 2nd Floor Washington, DC 20005	94-2763845	501(c)(3)	\$2,000 00	N/A	N/A	N/A	for Instituto de Libertad y Desarrollo
Atlas Economic Research Foundation 1201 L Street, NW 2nd Floor Washington, DC 20005	94-2763845	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for T Palmer projects
Committee for a Constructive Tomorrow 621 Harvest Court Bel Air, MD 21014	52-1462893	501(c)(3)	\$197,950 00	N/A	N/A	N/A	for CFACT's education fund
Empower Texans Foundation	27-1553324	501(c)(3)	\$18,500 00	N/A	N/A	N/A	for general operations
Hentage Foundation 214 Massachusetts Avenue, NE Washington, DC 20002-4999	23-7327730	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for the President's Club

## Sch I, Grants to Organizations and Individuals in the U S

## Part II, Grants to Organizations and Governments in the U.S.

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Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
John Hancock Committee for the States 3509 Connecticut Ave NW, Suite 260 Washington, DC 20008	27-1657203	501(c)(3)	\$80,000 00	N/A	N/A	N/A	for general operations
Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, NY 10017	13-2912529	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
National Center for Policy Analysis PO Box 650298 Dallas, TX 75265-0298	75-1804932	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for John Goodman's work
Pacific Research Institute for Public Policy One Embarcadero Center Suite 350 San Francisco, CA 94111	94-2528433	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
State Policy Network 1655 North Fort Myer Drive Suite 360 Arlington, VA 22209-3108	57-0952531	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
American Ideas Institute 4040 Fairfax Drive Suite 140 Arlington, VA 22203	27-0311492	501(c)(3)	\$50,000 00	N/A	N/A	N/A	for general operations
Citizens in Charge Foundation 2050 Old Bridge Road, Suite 103 Lake Ridge, VA 22192	13-4070270	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U.S.

## Part II, Grants to Organizations and Governments in the U.S.

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Headspring Group, Inc PO Box 19366 Kalamazoo, MI 49019	27-0904516	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
Institute of World Politics 1521 16th Street, NW Washington, DC 20036	52-1699641	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for general operations
Middle East Media and Research Institute, Inc PO Box 27837 Washington, DC 20038-7837	52-2068483	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Mountain States Legal Foundation 2596 South Lewis Way Lakewood, CO 80227	84-0736725	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Project Ventas 3308 Bourbon Street Fredericksburg, VA 22408	27-2894856	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
University of Arizona Foundation - Philosophy Department PO Box 210027 Tucson, AZ 85721-0027	86-6050388	501(c)(3)	\$76,000 00	N/A	N/A	N/A	for the Arizona Center for the Philosophy of Freedom
Yankee Institute 800 Connecticut Boulevard Suite 302 East Hartford, CT 06108	52-1358144	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
Conservative Agenda Project 1025 Thomas Jefferson Street, NW Suite 110 G Washington, DC 20007	26-4029303	501(c)(3)	\$42,000 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S

## Part II, Grants to Organizations and Governments in the U.S.

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Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for 50th Anniversary event
Sam Adams Alliance 400 West Erie, Suite #407 Chicago, IL 60654-6912	20-5792227	501(c)(3)	\$50,000 00	N/A	N/A	N/A	for general operations
The James Partnership 9302-C Old Keene Mill Road Burke, VA 22015	26-2521115	501(c)(3)	\$50,000 00	N/A	N/A	N/A	for general operations
Public Notice Research and Education Fund 1220 North Fillmore Street Suite 300 Arlington, VA 22201-6501	27-3197768	501(c)(3)	\$300,000 00	N/A	N/A	N/A	for general operations
Acton Institute 161 Ottawa Avenue NW Suite 301 Grand Rapids, MI 49503-2718	38-2926822	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Atlas Economic Research Foundation 1201 L Street, NW 2nd Floor Washington, DC 20005	94-2763845	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Cato Institute 1000 Massachusetts Avenue, NW Washington, DC 20001-5403	23-7432162	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Center for Competitive Politics 124 South West Street Suite 201 Alexandria, VA 22314	20-3676886	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S

**Part II, Grants to Organizations and Governments in the U.S.**

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Center for Independent Thought 1420 Walnut Street Suite 1011 Philadelphia, PA 19102	52-0945376	501(c)(3)	\$40,000 00	N/A	N/A	N/A	for Stossel in the Classroom
Commonwealth Foundation for Public Policy Alternative 225 State Street Suite 302 Harrisburg, PA 17101	23-2473845	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Federalist Society 1015 18th Street, NW Suite 425 Washington, DC 20036-5221	36-3235550	501(c)(3)	\$250,000 00	N/A	N/A	N/A	for general operations
Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$25,000 00	N/A	N/A	N/A	in support of your 50th Anniversary celebration
Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$250,000 00	N/A	N/A	N/A	for the capital campaign
Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
NFIB Legal Foundation 1201 F Street, NW Suite 200 Washington, DC 20004	62-1570449	501(c)(3)	\$400,000 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S

**Part II, Grants to Organizations and Governments in the U.S.**

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PERC 2048 Analysis Drive Suite A Bozeman, MT 59718	81-0393444	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Washington Policy Center PO Box 3643 Seattle, WA 98124-3643	91-1752769	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Young America's Foundation 110 Elden Street Herndon, VA 20170-4891	23-7042029	501(c)(3)	\$1,000 00	N/A	N/A	N/A	to preserve and maintain the Reagan Ranch
Donors Capital Fund PO Box 1305 Alexandria, VA 22313	54-1934032	501(c)(3)	\$500,000 00	N/A	N/A	N/A	for a donor-advised fund
Empower Texans Foundation	27-1553324	501(c)(3)	\$18,500 00	N/A	N/A	N/A	for general operations
Fund for American Studies 1706 New Hampshire Avenue, NW Suite 400 Washington, DC 20009	13-6223604	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
John Hancock Committee for the States 3509 Connecticut Ave NW, Suite 260 Washington, DC 20008	27-1657203	501(c)(3)	\$80,000 00	N/A	N/A	N/A	for general operations
State Policy Network 1655 North Fort Myer Drive Suite 360 Arlington, VA 22209-3108	57-0952531	501(c)(3)	\$90,000 00	N/A	N/A	N/A	for the Oregon Capitol Watch Foundation's start-up funds

## Sch I, Grants to Organizations and Individuals in the U S

## Part II, Grants to Organizations and Governments in the U.S.

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Acton Institute 161 Ottawa Avenue NW Suite 301 Grand Rapids, MI 49503-2718	38-2926822	501(c)(3)	\$250 00	N/A	N/A	N/A	for general operations
Acton Institute 161 Ottawa Avenue NW Suite 301 Grand Rapids, MI 49503-2718	38-2926822	501(c)(3)	\$1,500 00	N/A	N/A	N/A	for an MTF Fellowship to Acton University
Fourth Presbyterian Church 5500 River Road Bethesda, MD 20816	53-0196534	501(c)(3)	\$500 00	N/A	N/A	N/A	for the summer youth program ministry
Freedom Foundation PO Box 522 Olympia, WA 98507-0522	94-3136961	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for general operations
Grassroot Institute of Hawaii 1314 South King Street Suite 1163 Honolulu, HI 96814	99-0354937	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for Liberty Coalition Development
Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations
Committee for a Constructive Tomorrow 621 Harvest Court Bel Air, MD 21014	52-1462893	501(c)(3)	\$99,950 00	N/A	N/A	N/A	for CFACT's Environmental Educational Fund
Acton Institute 161 Ottawa Avenue NW Suite 301 Grand Rapids, MI 49503-2718	38-2926822	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for 21st Annual Dinner



## Sch I, Grants to Organizations and Individuals in the U.S

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Atlas Economic Research Foundation 1201 L Street, NW 2nd Floor Washington, DC 20005	94-2763845	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for projects directed by Leonard Liggio
Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$60,000 00	N/A	N/A	N/A	for general operations
Mercatus Center, GMU George Mason University 3351 North Fairfax Drive, 4th Floor Arlington, VA 22201-4433	54-1436224	501(c)(3)	\$7,000 00	N/A	N/A	N/A	for general operations
Pacific Research Institute for Public Policy One Embarcadero Center Suite 350 San Francisco, CA 94111	94-2528433	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Sam Adams Alliance 400 West Erie, Suite #407 Chicago, IL 60654-6912	20-5792227	501(c)(3)	\$75,000 00	N/A	N/A	N/A	for general operations
Yankee Institute 800 Connecticut Boulevard Suite 302 East Hartford, CT 06108	52-1358144	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
Young America's Foundation 110 Elden Street Hemdon, VA 20170-4891	23-7042029	501(c)(3)	\$20,000 00	N/A	N/A	N/A	for general operations
American Spectator Foundation 1611 North Kent Street Suite 901 Arlington, VA 22209-2111	23-7002632	501(c)(3)	\$5,000 00	N/A	N/A	N/A	to support the November 1 annual dinner

## Sch I, Grants to Organizations and Individuals in the U S

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Discovery Community Church P O Box 111840 Tacoma, WA 98411		501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
Discovery Institute 1511 Third Avenue, Suite 808 Seattle, WA 98101	91-1521697	501(c)(3)	\$250,000 00	N/A	N/A	N/A	for general operations
Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Leadership Institute 1101 North Highland Street Arlington, VA 22201	51-0235174	501(c)(3)	\$60,000 00	N/A	N/A	N/A	for general operations
Federalist Society 1015 18th Street, NW Suite 425 Washington, DC 20036-5221	36-3235550	501(c)(3)	\$300,000 00	N/A	N/A	N/A	for general operations
Institute on Religion and Public Life 156 Fifth Avenue, Suite 400 New York, NY 10010	52-1628303	501(c)(3)	\$29,550 00	N/A	N/A	N/A	for the Hertog/Simon Seminar After Liberalism
Intercollegiate Studies Institute 3901 Centerville Road Wilmington, DE 19087-1938	23-6050131	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for Silver Sponsorship of the upcoming Annual Dinner
Juilliard School 60 Lincoln Center Plaza New York, NY 10023	13-1624067	501(c)(3)	\$7,000 00	N/A	N/A	N/A	for a Student Aid Grant ot support graduate studies

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Americans for Tax Reform Foundation 722 12th Street, NW Suite 400 Washington, DC 20005	52-1400492	501(c)(3)	\$40,000 00	N/A	N/A	N/A	for general operations
Federalist Society 1015 18th Street, NW Suite 425 Washington, DC 20036-5221	36-3235550	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
Landmark Legal Foundation 19415 Deerfield Avenue Suite 312 Leesburg, VA 20176	51-0203802	501(c)(3)	\$40,000 00	N/A	N/A	N/A	for general operations
National Right to Work Legal Defense Foundation, Inc 8001 Braddock Road Springfield, VA 22160-0002	59-1588825	501(c)(3)	\$40,000 00	N/A	N/A	N/A	for general operations
Empower Texans Foundation	27-1553324	501(c)(3)	\$18,500 00	N/A	N/A	N/A	for general operations
Grassroot Institute of Hawaii 1314 South King Street Suite 1163 Honolulu, HI 96814	99-0354937	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for Liberty Coalition development
John Hancock Committee for the States 3509 Connecticut Ave NW, Suite 260 Washington, DC 20008	27-1657203	501(c)(3)	\$80,000 00	N/A	N/A	N/A	for general operations
National Legal & Policy Center 107 Park Washington Court Falls Church, VA 22046	52-1750188	501(c)(3)	\$1,250 00	N/A	N/A	N/A	for general operations

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Students for Liberty PO Box 17321 Arlington, VA 22216-7321	94-3435899	501(c)(3)	\$5,000 00	N/A	N/A	N/A	to support the charity Poker Tournament
Americans for Prosperity Foundation 2111 Wilson Boulevard Suite 350 Arlington, VA 22201-3097	52-1527294	501(c)(3)	\$300,000 00	N/A	N/A	N/A	for general operations
Franklin Center 1229 King Street 3rd Floor Alexandria, VA 22314	26-4066298	501(c)(3)	\$350,000 00	N/A	N/A	N/A	for general operations
Legacy Foundation c/o The Security National Bank 601 Pierce Street, Trust Department Sioux City, IA 51101-1205	26-3853831	501(c)(3)	\$625,000 00	N/A	N/A	N/A	for general operations
Public Notice Research and Education Fund 1220 North Fillmore Street Suite 300 Arlington, VA 22201-6501	27-3197768	501(c)(3)	\$800,000 00	N/A	N/A	N/A	for general operations
Committee for a Constructive Tomorrow 621 Harvest Court Bel Air, MD 21014	52-1462893	501(c)(3)	\$99,950 00	N/A	N/A	N/A	for general operations
Center for Education Reform 910 17th Street, NW 11th Floor Washington, DC 20006	52-1847187	501(c)(3)	\$7,000 00	N/A	N/A	N/A	for general operations
Foreign Policy Initiative 11 Dupont Circle, NW Suite 325 Washington, DC 20036	26-4392915	501(c)(3)	\$500,000 00	N/A	N/A	N/A	for general operations

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(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
Landmark Legal Foundation 19415 Deerfield Avenue Suite 312 Leesburg, VA 20176	51-0203802	501(c)(3)	\$2,000 00	N/A	N/A	N/A	for general operations
Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, NY 10017	13-2912529	501(c)(3)	\$6,000 00	N/A	N/A	N/A	for general operations
Yankee Institute 800 Connecticut Boulevard Suite 302 East Hartford, CT 06108	52-1358144	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
Headspring Group, Inc PO Box 19366 Kalamazoo, MI 49019	27-0904516	501(c)(3)	\$20,000 00	N/A	N/A	N/A	for general operations
Pacific Research Institute for Public Policy One Embarcadero Center Suite 350 San Francisco, CA 94111	94-2528433	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for Gala Sponsorship
Atlas Economic Research Foundation 1201 L Street, NW 2nd Floor Washington, DC 20005	94-2763845	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for Freedom Dinner
Committee for a Constructive Tomorrow 621 Harvest Court Bel Air, MD 21014	52-1462893	501(c)(3)	\$199,930 00	N/A	N/A	N/A	for general operations
Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for the Labor Policy Program

## Sch I, Grants to Organizations and Individuals in the U S

**Part II, Grants to Organizations and Governments in the U.S.**

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
International Policy Network US, Inc 214 Massachusetts Avenue, NE Washington, DC 20002	52-2363626	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for the Bastiat Prize Program only, not for the program's dinner
Federalist Society 1015 18th Street, NW Suite 425 Washington, DC 20036-5221	36-3235550	501(c)(3)	\$350,000 00	N/A	N/A	N/A	for general operations
Iranian Freedom Institute PO Box 1722 Falls Church, VA 22041	27-0586116	501(c)(3)	\$100,000 00	N/A	N/A	N/A	for general operations
NFIB Legal Foundation 1201 F Street, NW Suite 200 Washington, DC 20004	62-1570449	501(c)(3)	\$300,000 00	N/A	N/A	N/A	for general operations
The James Partnership 9302-C Old Keene Mill Road Burke, VA 22015	26-2521115	501(c)(3)	\$50,000 00	N/A	N/A	N/A	for general operations
Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$10,000 00	N/A	N/A	N/A	in support of the 50th Anniversary Dinner
Young America's Foundation 110 Elden Street Herndon, VA 20170-4891	23-7042029	501(c)(3)	\$20,000 00	N/A	N/A	N/A	for general operations
Hudson Institute 1015 15th Street, NW 6th Floor Washington, DC 20005-2705	13-1945157	501(c)(3)	\$115,000 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U.S.

## Part II, Grants to Organizations and Governments in the U.S.

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
Acton Institute 161 Ottawa Avenue NW Suite 301 Grand Rapids, MI 49503-2718	38-2926822	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for the Help a Promising Leader Learn about Liberty mailing
Atlas Economic Research Foundation 1201 L Street, NW 2nd Floor Washington, DC 20005	94-2763845	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
Empower Texans Foundation	27-1553324	501(c)(3)	\$18,500 00	N/A	N/A	N/A	for general operations
John Hancock Committee for the States 3509 Connecticut Ave NW, Suite 260 Washington, DC 20008	27-1657203	501(c)(3)	\$80,000 00	N/A	N/A	N/A	for general operations
New York Historical Society 170 Central Park West New York, NY 10024	13-1624124	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for the History Makers Gala
Acton Institute 161 Ottawa Avenue NW Suite 301 Grand Rapids, MI 49503-2718	38-2926822	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Atlas Economic Research Foundation 1201 L Street, NW 2nd Floor Washington, DC 20005	94-2763845	501(c)(3)	\$10,900 00	N/A	N/A	N/A	for the 30th Anniversary Freedom Dinner
Cato Institute 1000 Massachusetts Avenue, NW Washington, DC 20001-5403	23-7432162	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations

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## Part II, Grants to Organizations and Governments in the U.S.

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Citizens in Charge Foundation 2050 Old Bridge Road, Suite 103 Lake Ridge, VA 22192	13-4070270	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations
Committee for a Constructive Tomorrow 621 Harvest Court Bel Air, MD 21014	52-1462893	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Diocese of San Jose 1150 North 1st Street, Suite 100 San Jose, CA 95112-4966	94-2734503	501(c)(3)	\$200 00	N/A	N/A	N/A	for the Annual Diocesan Appeal
Federalist Society 1015 18th Street, NW Suite 425 Washington, DC 20036-5221	36-3235550	501(c)(3)	\$93,000 00	N/A	N/A	N/A	for general operations
Freedom Works Foundation 400 North Capitol Street, NW Suite 765 Washington, DC 20001-1564	52-1526916	501(c)(3)	\$100,000 00	N/A	N/A	N/A	for general operations
Grassroot Institute of Hawaii 1314 South King Street Suite 1163 Honolulu, HI 96814	99-0354937	501(c)(3)	\$3,500 00	N/A	N/A	N/A	for website development and HR advertising
Illinois Policy Institute 190 South LaSalle Street Suite 1630 Chicago, IL 60603	41-2057028	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations



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## Part II, Grants to Organizations and Governments in the U.S.

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Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Philanthropy Roundtable 1730 M Street, NW Suite 601 Washington, DC 20036	13-2943020	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
State Policy Network 1655 North Fort Myer Drive Suite 360 Arlington, VA 22209-3108	57-0952531	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations
American Majority PO Box 87 Purcellville, VA 20134	26-1501154	501(c)(3)	\$50,000 00	N/A	N/A	N/A	for general operations
Americans for Limited Government Research Foundation 9900 Main Street, Suite 303 Fairfax, VA 22031	52-2020468	501(c)(3)	\$500,000 00	N/A	N/A	N/A	for general operations
Atlas Economic Research Foundation 1201 L Street, NW 2nd Floor Washington, DC 20005	94-2763845	501(c)(3)	\$2,000 00	N/A	N/A	N/A	for general operations
Autism Speaks 5455 Wilshire Blvd Suite 2250 Los Angeles, CA 90036	20-2329938	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for sponsorship of Billy Mann run in 2011 ING NYC Marathon with Autism Speaks
Harvard University Knafel Building - Harvard University 1737 Cambridge Street Cambridge, MA 02138	53-0199180	501(c)(3)	\$70,000 00	N/A	N/A	N/A	for the Program on Constitutional Government

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## Part II, Grants to Organizations and Governments in the U.S.

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Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for 50th anniversary celebration
Institute of World Politics 1521 16th Street, NW Washington, DC 20036	52-1699641	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for general operations
Intelligence Squared U S Foundation 590 Madison Avenue 30th Floor New York, NY 10022-8547	27-1022579	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
MIT Chemical Engineering Department 77 Massachusetts Ave Cambridge, MA 02139	04-2103594	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for the benefit of the Benjamin Franklin Forum
Singularity Institute for Artificial Intelligence Inc PO Box 472079 San Francisco, CA 94147-2079	58-2565917	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
Stony Brook Foundation Inc 230 Administration Stony Brook, NY 11794-1188	11-6077945	501(c)(3)	\$12,000 00	N/A	N/A	N/A	for Turkana Basin Institute
Student Achievement and Advocacy Services 1511 16th Street #101 Santa Monica, CA 90404-3347	52-2237872	501(c)(3)	\$6,250 00	N/A	N/A	N/A	for the Adventures of the Mind program
Conservative Agenda Project 1025 Thomas Jefferson Street, NW Suite 110 G Washington, DC 20007	26-4029303	501(c)(3)	\$45,000 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S.

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International Policy Network US, Inc 214 Massachusetts Avenue, NE Washington, DC 20002	52-2363626	501(c)(3)	\$2,000 00	N/A	N/A	N/A	to supplement awards made during the Bastiat Prize Dinner
International Policy Network US, Inc 214 Massachusetts Avenue, NE Washington, DC 20002	52-2363626	501(c)(3)	\$12,000 00	N/A	N/A	N/A	for the Bastiat Dinner
Yankee Institute 800 Connecticut Boulevard Suite 302 East Hartford, CT 06108	52-1358144	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
American Enterprise Institute 1150 Seventeenth Street, NW Washington, DC 20036	53-0218495	501(c)(3)	\$250 00	N/A	N/A	N/A	for general operations
Cato Institute 1000 Massachusetts Avenue, NW Washington, DC 20001-5403	23-7432162	501(c)(3)	\$200 00	N/A	N/A	N/A	for general operations
Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$200 00	N/A	N/A	N/A	for general operations
Freedom Foundation PO Box 522 Olympia, WA 98507-0522	94-3136961	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for general operations
Heritage Foundation 214 Massachusetts Avenue, NE Washington, DC 20002-4999	23-7327730	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S

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Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations
Mercatus Center, GMU George Mason University 3351 North Fairfax Drive, 4th Floor Arlington, VA 22201-4433	54-1436224	501(c)(3)	\$200 00	N/A	N/A	N/A	for general operations
Reason Foundation 3415 South Sepulveda Boulevard Suite 400 Los Angeles, CA 90034-6014	95-3298239	501(c)(3)	\$200 00	N/A	N/A	N/A	for general operations
Yellowstone Park Foundation 222 East Main Street, Suite 301 Bozeman, MT 59715	83-0311166	501(c)(3)	\$30,000 00	N/A	N/A	N/A	for your Slough Creek watershed/rainbow trout project
Committee for a Constructive Tomorrow 621 Harvest Court Bel Air, MD 21014	52-1462893	501(c)(3)	\$199,950 00	N/A	N/A	N/A	for CFACT's Environmental Educational Fund
Center for Individual Rights 1233 20th Street, NW Suite 300 Washington, DC 20036-1609	52-1600481	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for the litigation program
America's Majority Foundation 8640 Travis Street Overland Park, KS 66212	22-3947727	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for the Nevada project
Center for Competitive Politics 124 South West Street Suite 201 Alexandria, VA 22314	20-3676886	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations

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Legacy Foundation c/o The Security National Bank 601 Pierce Street, Trust Department Sioux City, IA 51101-1205	26-3853831	501(c)(3)	\$1,000,000 00	N/A	N/A	N/A	for general operations
Empower Texans Foundation	27-1553324	501(c)(3)	\$18,500 00	N/A	N/A	N/A	for general operations
John Hancock Committee for the States 3509 Connecticut Ave NW, Suite 260 Washington, DC 20008	27-1657203	501(c)(3)	\$51,916 16	N/A	N/A	N/A	for general operations
Africa Fighting Malana Int , Inc 1150 17th Street, NW, Suite 910 Washington, DC 20036	30-0162292	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for Roger Bate's project
Discovery Institute 1511 Third Avenue, Suite 808 Seattle, WA 98101	91-1521697	501(c)(3)	\$250,000 00	N/A	N/A	N/A	for general operations
Grassroot Institute of Hawaii 1314 South King Street Suite 1163 Honolulu, HI 96814	99-0354937	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for Liberty Coalition Development
Grassroot Institute of Hawaii 1314 South King Street Suite 1163 Honolulu, HI 96814	99-0354937	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for Liberty Coalition Development
Federalist Society 1015 18th Street, NW Suite 425 Washington, DC 20036-5221	36-3235550	501(c)(3)	\$20,000 00	N/A	N/A	N/A	for general operations

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**Part II, Grants to Organizations and Governments in the U.S.**

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PERC 2048 Analysis Drive Suite A Bozeman, MT 59718	81-0393444	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for the PERC building campaign
Atlas Economic Research Foundation 1201 L Street, NW 2nd Floor Washington, DC 20005	94-2763845	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations (motivated to support international outreach and discovery)
Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for general operations
Judicial Watch 425 Third Street, SW Suite 800 Washington, DC 20024	52-1885088	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for general operations
Mountain States Legal Foundation 2596 South Lewis Way Lakewood, CO 80227	84-0736725	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for general operations
Illinois Policy Institute 190 South LaSalle Street Suite 1630 Chicago, IL 60603	41-2057028	501(c)(3)	\$116,706 76	N/A	N/A	N/A	for general operations
Job Creators Alliance 1700 Pacific Avenue % Workplace Solutions, Suite #3640 Dallas, TX 75201		501(c)(3)	\$125,000 00	N/A	N/A	N/A	for general operations
Yankee Institute 800 Connecticut Boulevard Suite 302 East Hartford, CT 06108	52-1358144	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations

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Community Action Centers Project 2600 Overland Avenue Suite 315 Los Angeles, CA 90064-3253	20-0071617	501(c)(3)	\$800,000 00	N/A	N/A	N/A	for the Florida Project
NFIB Legal Foundation 1201 F Street, NW Suite 200 Washington, DC 20004	62-1570449	501(c)(3)	\$250,000 00	N/A	N/A	N/A	for general operations
America's Majority Foundation 8640 Travis Street Overland Park, KS 66212	22-3947727	501(c)(3)	\$39,600 00	N/A	N/A	N/A	for general operations
The James Partnership 9302-C Old Keene Mill Road Burke, VA 22015	26-2521115	501(c)(3)	\$50,000 00	N/A	N/A	N/A	for general operations
Atlas Economic Research Foundation 1201 L Street, NW 2nd Floor Washington, DC 20005	94-2763845	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Grassroot Institute of Hawaii 1314 South King Street Suite 1163 Honolulu, HI 96814	99-0354937	501(c)(3)	\$5,250 00	N/A	N/A	N/A	for the Amicus Brief to SCOTUS
America's Majority Foundation 8640 Travis Street Overland Park, KS 66212	22-3947727	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Illinois Policy Institute 190 South LaSalle Street Suite 1630 Chicago, IL 60603	41-2057028	501(c)(3)	\$7,500 00	N/A	N/A	N/A	for general operations

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Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Acton Institute 161 Ottawa Avenue NW Suite 301 Grand Rapids, MI 49503-2718	38-2926822	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations
Americans for Prosperity Foundation 2111 Wilson Boulevard Suite 350 Arlington, VA 22201-3097	52-1527294	501(c)(3)	\$90,000 00	N/A	N/A	N/A	for general operations
Cato Institute 1000 Massachusetts Avenue, NW Washington, DC 20001-5403	23-7432162	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations
Federalist Society 1015 18th Street, NW Suite 425 Washington, DC 20036-5221	36-3235550	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations
Furman University Department of Political Science 3300 Poinsett Highway Greenville, SC 29613-1000	57-0314395	501(c)(3)	\$30,000 00	N/A	N/A	N/A	for the benefit of The Tocqueville Program
Grassroot Institute of Hawaii 1314 South King Street Suite 1163 Honolulu, HI 96814	99-0354937	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for Liberty Coalition Development
Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations



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Mercatus Center, GMU George Mason University 3351 North Fairfax Drive, 4th Floor Arlington, VA 22201-4433	54-1436224	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations
Public Notice Research and Education Fund 1220 North Fillmore Street Suite 300 Arlington, VA 22201-6501	27-3197768	501(c)(3)	\$144,000 00	N/A	N/A	N/A	for general operations
Conservative Agenda Project 1025 Thomas Jefferson Street, NW Suite 110 G Washington, DC 20007	26-4029303	501(c)(3)	\$30,000 00	N/A	N/A	N/A	for general operations
Empower Texans Foundation	27-1553324	501(c)(3)	\$18,500 00	N/A	N/A	N/A	for general operations
Fund for American Studies 1706 New Hampshire Avenue, NW Suite 400 Washington, DC 20009	13-6223604	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
National Right to Work Legal Defense Foundation, Inc 8001 Braddock Road Springfield, VA 22160-0002	59-1588825	501(c)(3)	\$20,000 00	N/A	N/A	N/A	for general operations
GMU Foundation Department of Economics, Enterprise Hall George Mason University Fairfax, VA 22030	54-1603842	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for support of the Merten Scholars Endowment

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Media Research Center 325 South Patrick Street Alexandria, VA 22314	54-1429009	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
American Action Forum 1401 New York Avenue, NW Suite 1200 Washington, DC 20005	27-0567765	501(c)(3)	\$70,000 00	N/A	N/A	N/A	for general operations
Franklin Center 1229 King Street 3rd Floor Alexandria, VA 22314	26-4066298	501(c)(3)	\$644,000 00	N/A	N/A	N/A	for general operations
Independence Institute 727 East 16th Avenue Denver, CO 80203	84-0990300	501(c)(3)	\$100,000 00	N/A	N/A	N/A	for general operations
Independent Women's Forum 1875 I Street, NW Suite 500 Washington, DC 20006	54-1670627	501(c)(3)	\$40,000 00	N/A	N/A	N/A	for general operations
Institute for Educational Advancement 625 Fair Oaks Avenue Suite 285 South Pasadena, CA 91030-5836	95-4695698	501(c)(3)	\$600,000 00	N/A	N/A	N/A	for support of the Caroline D Bradley Scholarship Program
Judicial Education Project 9502 Nelson Lane Manassas, VA 20110	20-2466871	501(c)(3)	\$50,000 00	N/A	N/A	N/A	for general operations
NFIB Legal Foundation 1201 F Street, NW Suite 200 Washington, DC 20004	62-1570449	501(c)(3)	\$200,000 00	N/A	N/A	N/A	for general operations

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(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
Pacific Research Institute for Public Policy One Embarcadero Center Suite 350 San Francisco, CA 94111	94-2528433	501(c)(3)	\$100,000 00	N/A	N/A	N/A	for general operations
Texas Public Policy Foundation 900 Congress Avenue Suite 400 Austin, TX 78701	74-2524057	501(c)(3)	\$50,000 00	N/A	N/A	N/A	for general operations
Mercatus Center, GMU George Mason University 3351 North Fairfax Drive, 4th Floor Arlington, VA 22201-4433	54-1436224	501(c)(3)	\$3,000 00	N/A	N/A	N/A	for general operations
Reason Foundation 3415 South Sepulveda Boulevard Suite 400 Los Angeles, CA 90034-6014	95-3298239	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Foundation for Cultural Review 900 Broadway Suite 602 New York, NY 10003	13-3108424	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for the Friends of the New Cenotaph
Middle East Media and Research Institute, Inc PO Box 27837 Washington, DC 20038-7837	52-2068483	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
National Review Institute 233 Pennsylvania Avenue, SE Washington, DC 20003	13-3649537	501(c)(3)	\$9,500 00	N/A	N/A	N/A	for editing and publishing during October and November of 2011
Project Ventas 3308 Bourbon Street Fredericksburg, VA 22408	27-2894856	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U.S

**Part II, Grants to Organizations and Governments in the U.S.**

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
Shriners Hospitals for Children PO Box 31356 Tampa, FL 33631	36-2193608	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Cato Institute 1000 Massachusetts Avenue, NW Washington, DC 20001-5403	23-7432162	501(c)(3)	\$250 00	N/A	N/A	N/A	for general operations
Claremont Institute 937 West Foothill Boulevard Suite E Claremont, CA 91711	95-3443202	501(c)(3)	\$250 00	N/A	N/A	N/A	for general operations
Hentage Foundation 214 Massachusetts Avenue, NE Washington, DC 20002-4999	23-7327730	501(c)(3)	\$250 00	N/A	N/A	N/A	for general operations
National Legal & Policy Center 107 Park Washington Court Falls Church, VA 22046	52-1750188	501(c)(3)	\$1,250 00	N/A	N/A	N/A	for general operations
Yankee Institute 800 Connecticut Boulevard Suite 302 East Hartford, CT 06108	52-1358144	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
Cato Institute 1000 Massachusetts Avenue, NW Washington, DC 20001-5403	23-7432162	501(c)(3)	\$250 00	N/A	N/A	N/A	for general operations
Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S

## Part II, Grants to Organizations and Governments in the U.S.

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
David Project, The PO Box 52390 Boston, MA 02205-2390	16-1616489	501(c)(3)	\$10,000 00	N/A	N/A	N/A	in honor of Seth Klarman
Fund for American Studies 1706 New Hampshire Avenue, NW Suite 400 Washington, DC 20009	13-6223604	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Hentage Foundation 214 Massachusetts Avenue, NE Washington, DC 20002-4999	23-7327730	501(c)(3)	\$250 00	N/A	N/A	N/A	for general operations
Illinois Policy Institute 190 South LaSalle Street Suite 1630 Chicago, IL 60603	41-2057028	501(c)(3)	\$200,000 00	N/A	N/A	N/A	for general operations
Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
National Right to Work Legal Defense Foundation, Inc 8001 Braddock Road Springfield, VA 22160-0002	59-1588825	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
PERC 2048 Analysis Drive Suite A Bozeman, MT 59718	81-0393444	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Acton Institute 161 Ottawa Avenue NW Suite 301 Grand Rapids, MI 49503-2718	38-2926822	501(c)(3)	\$1,500 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S

## Part II, Grants to Organizations and Governments in the U.S.

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
American Enterprise Institute 1150 Seventeenth Street, NW Washington, DC 20036	53-0218495	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
American Enterprise Institute 1150 Seventeenth Street, NW Washington, DC 20036	53-0218495	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Americans for Prosperity Foundation 2111 Wilson Boulevard Suite 350 Arlington, VA 22201-3097	52-1527294	501(c)(3)	\$2,000 00	N/A	N/A	N/A	for general operations
Atlas Economic Research Foundation 1201 L Street, NW 2nd Floor Washington, DC 20005	94-2763845	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for general operations
Bill of Rights Institute 200 North Glebe Road Suite 200 Arlington, VA 22203	48-0891418	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Bill of Rights Institute 200 North Glebe Road Suite 200 Arlington, VA 22203	48-0891418	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Cato Institute 1000 Massachusetts Avenue, NW Washington, DC 20001-5403	23-7432162	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for benefactor renewal
Cato Institute 1000 Massachusetts Avenue, NW Washington, DC 20001-5403	23-7432162	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S

## Part II, Grants to Organizations and Governments in the U.S.

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
Cato Institute 1000 Massachusetts Avenue, NW Washington, DC 20001-5403	23-7432162	501(c)(3)	\$8,333 00	N/A	N/A	N/A	for the capital campaign
Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Freedom Works Foundation 400 North Capitol Street, NW Suite 765 Washington, DC 20001-1564	52-1526916	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Freedom Works Foundation 400 North Capitol Street, NW Suite 765 Washington, DC 20001-1564	52-1526916	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Fund for American Studies 1706 New Hampshire Avenue, NW Suite 400 Washington, DC 20009	13-6223604	501(c)(3)	\$2,000 00	N/A	N/A	N/A	for general operations
Heritage Foundation 214 Massachusetts Avenue, NE Washington, DC 20002-4999	23-7327730	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$1,200 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S

## Part II, Grants to Organizations and Governments in the U.S.

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Leadership Institute 1101 North Highland Street Arlington, VA 22201	51-0235174	501(c)(3)	\$1,500 00	N/A	N/A	N/A	for general operations
Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, NY 10017	13-2912529	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Mercatus Center, GMU George Mason University 3351 North Fairfax Drive, 4th Floor Arlington, VA 22201-4433	54-1436224	501(c)(3)	\$1,500 00	N/A	N/A	N/A	for general operations
National Center for Policy Analysis PO Box 650298 Dallas, TX 75265-0298	75-1804932	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
National Legal & Policy Center 107 Park Washington Court Falls Church, VA 22046	52-1750188	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Rockefeller University 1230 York Avenue New York, NY 10021	13-1624158	501(c)(3)	\$10,000 00	N/A	N/A	N/A	for general operations
Acton Institute 161 Ottawa Avenue NW Suite 301 Grand Rapids, MI 49503-2718	38-2926822	501(c)(3)	\$250 00	N/A	N/A	N/A	for general operations



## Sch I, Grants to Organizations and Individuals in the U S

**Part II, Grants to Organizations and Governments in the U.S.**

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
Bill of Rights Institute 200 North Glebe Road Suite 200 Arlington, VA 22203	48-0891418	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations
Cato Institute 1000 Massachusetts Avenue, NW Washington, DC 20001-5403	23-7432162	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Cato Institute 1000 Massachusetts Avenue, NW Washington, DC 20001-5403	23-7432162	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Citizens' Council for Health Freedom 161 St Anthony Avenue Suite 923 St Paul, MN 55103	41-1916724	501(c)(3)	\$250 00	N/A	N/A	N/A	for general operations
Institute for Humane Studies 3301 North Fairfax Drive Suite 440 Arlington, VA 22201-4432	94-1623852	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations
Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Institute for Justice 901 North Glebe Road Suite 900 Arlington, VA 22203-1854	52-1744337	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for general operations
Landmark Legal Foundation 19415 Deerfield Avenue Suite 312 Leesburg, VA 20176	51-0203802	501(c)(3)	\$250 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S

## Part II, Grants to Organizations and Governments in the U.S.

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
Last Hope, Inc PO Box 114 Farmington, MN 55024	41-1520897	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations
Manjuana Policy Project Foundation PO Box 77492 Washington, DC 20013	52-1975211	501(c)(3)	\$250 00	N/A	N/A	N/A	for general operations
Mountain States Legal Foundation 2596 South Lewis Way Lakewood, CO 80227	84-0736725	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations
PERC 2048 Analysis Drive Suite A Bozeman, MT 59718	81-0393444	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations
Reason Foundation 3415 South Sepulveda Boulevard Suite 400 Los Angeles, CA 90034-6014	95-3298239	501(c)(3)	\$100 00	N/A	N/A	N/A	for general operations
American Ideas Institute 4040 Fairfax Drive Suite 140 Arlington, VA 22203	27-0311492	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations
Competitive Enterprise Institute 1899 L Street, NW 12th Floor Washington, DC 20036	52-1351785	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for general operations
David Horowitz Freedom Center PO Box 55089 Sherman Oaks, CA 91499-1964	95-4194642	501(c)(3)	\$500 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S

## Part II, Grants to Organizations and Governments in the U.S.

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
Family Taxpayers Foundation 8 East Main Street Carpentersville, IL 60110	36-3895370	501(c)(3)	\$100,000 00	N/A	N/A	N/A	for general operations
Middle East Forum 1500 Walnut Street, Suite 1050 Philadelphia, PA 19102	23-7749796	501(c)(3)	\$15,000 00	N/A	N/A	N/A	for general operations
Fourth Presbytenan Church 5500 River Road Bethesda, MD 20816	53-0196534	501(c)(3)	\$22,000 00	N/A	N/A	N/A	for the Mortgage Burn Campaign and Special Blessings
Fund for Amencan Studies 1706 New Hampshire Avenue, NW Suite 400 Washington, DC 20009	13-6223604	501(c)(3)	\$1,000 00	N/A	N/A	N/A	for Lee & Mabel Weil Fellow
Chnstopher Newport University 1 Avenue of the Arts Newport News, VA 23606-3072	54-0701501	501(c)(3)	\$25,000 00	N/A	N/A	N/A	for the benefit of a JMC- Ventas Post-Doc at the Center for Amencan Studies
Reason Foundation 3415 South Sepulveda Boulevard Suite 400 Los Angeles, CA 90034-6014	95-3298239	501(c)(3)	\$20,000 00	N/A	N/A	N/A	for general operations
Iranian Freedom Institute PO Box 1722 Falls Church, VA 22041	27-0586116	501(c)(3)	\$153,450 00	N/A	N/A	N/A	for general operations
Heritage Foundation 214 Massachusetts Avenue, NE Washington, DC 20002-4999	23-7327730	501(c)(3)	\$5,000 00	N/A	N/A	N/A	for general operations

## Sch I, Grants to Organizations and Individuals in the U S

**Part II, Grants to Organizations and Governments in the U.S.**

(a) Name and Address of Organization or Government	(b) EIN	(c) IRC Section if Applicable	(d) Amount of Cash Grant	(e) Amount of Non-Cash Assistance	(f) Method of Valuation (book, FMV, appraisal, other)	(g) Description of Non-Cash Assistance	(h) Purpose of Grant or Assistance
National Right to Work Legal Defense Foundation, Inc 8001 Braddock Road Springfield, VA 22160-0002	59-1588825	501(c)(3)	\$2,500 00	N/A	N/A	N/A	for general operations

**Part III Grants and Other Assistance to Individuals in the United States.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 22.  
Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
1					
2					
3					
4					
5					
6					
7					

**Part IV Supplemental Information.** Complete this part to provide the information required in Part I, line 2, and any other additional information.

Pt I Line 2 The Organization sends each grant recipient a letter stating by cashing the grant check

Pt I Line 2 grantee agrees grant funds will not be used to benefit any disqualified person. All grants

Pt I Line 2 are made to U.S. public charities. In most cases, the Organization relies upon the

Pt I Line 2 oversight provided by United States and individual states' rules and regulations

Pt I Line 2 applicable to such charities. In some cases, a report of use of funds is requested.

Pt I Line 2 Grantees must agree that grant funds are not to be used for lobbying or

Pt I Line 2 any type of political activity.

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**SCHEDULE J**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Compensation Information**

**For certain Officers, Directors, Trustees, Key Employees, and Highest  
Compensated Employees**

- **Complete if the organization answered 'Yes' to Form 990, Part IV, line 23.**  
► **Attach to Form 990.** ► **See separate instructions.**

OMB No 1545-0047

**2011**

**Open to Public  
Inspection**

Name of the organization

**Donors Trust, Inc.**

Employer identification number

**52-2166327**

**Part I Questions Regarding Compensation**

- 1 a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items

- |  |  |
|--|--|
| <input type="checkbox"/> First-class or charter travel             | <input type="checkbox"/> Housing allowance or residence for personal use |
| <input type="checkbox"/> Travel for companions                     | <input type="checkbox"/> Payments for business use of personal residence |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees   |
| <input type="checkbox"/> Discretionary spending account            | <input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef) |

- b** If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If 'No,' complete Part III to explain

- 2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?

- 3** Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director. Explain in Part III

- |   |   |
|---|---|
| <input checked="" type="checkbox"/> Compensation committee          | <input type="checkbox"/> Written employment contract                                |
| <input type="checkbox"/> Independent compensation consultant        | <input type="checkbox"/> Compensation survey or study                               |
| <input checked="" type="checkbox"/> Form 990 of other organizations | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

- 4** During the year, did any person listed in Form 990, Part VII, Section A, line 1a with respect to the filing organization or a related organization:

- a** Receive a severance payment or change-of-control payment?

- b** Participate in, or receive payment from, a supplemental nonqualified retirement plan?

- c** Participate in, or receive payment from, an equity-based compensation arrangement?

If 'Yes' to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III

**Only section 501(c)(3) and 501(c)(4) organizations must complete lines 5-9.**

- 5** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization?

- b** Any related organization?

If 'Yes' to line 5a or 5b, describe in Part III

- 6** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization?

- b** Any related organization?

If 'Yes' to line 6a or 6b, describe in Part III

- 7** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If 'Yes,' describe in Part III

- 8** Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If 'Yes,' describe in Part III

- 9** If 'Yes' to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

Yes No

1b

2

4a

4b

4c

5a

5b

6a

6b

7

8

9

X

X

X

X

X

X

X

X

X

**BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990.**

Schedule J (Form 990) 2011

**Part III Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.

**Note.** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable columns (D) and (E) amounts for that individual.

(A) Name		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation reported as deferred in prior Form 990
		(i) Base compensation	(ii) Bonus and incentive compensation	(iii) Other reportable compensation				
1 Whitney L Ball	(i)	198,584.	0.	0.	19,858.	0.	218,442.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
2 Jeffrey C. Zysik	(i)	160,000.	0.	0.	0.	0.	160,000.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
3	(i)							
	(ii)							
4	(i)							
	(ii)							
5	(i)							
	(ii)							
6	(i)							
	(ii)							
7	(i)							
	(ii)							
8	(i)							
	(ii)							
9	(i)							
	(ii)							
10	(i)							
	(ii)							
11	(i)							
	(ii)							
12	(i)							
	(ii)							
13	(i)							
	(ii)							
14	(i)							
	(ii)							
15	(i)							
	(ii)							
16	(i)							
	(ii)							

BAA

**Part III** Supplemental Information

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, for Part II. Also complete this part for any additional information.

**BAA**



**SCHEDULE M  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Noncash Contributions**

- **Complete if the organizations answered 'Yes'**  
**on Form 990, Part IV, lines 29 or 30.**  
► **Attach to Form 990.**

OMB No 1545-0047

**2011**

**Open To Public  
Inspection**

Name of the organization

Donors Trust, Inc.

Employer identification number

52-2166327

**Part I Types of Property**

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art – Works of art				
2 Art – Historical treasures				
3 Art – Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities – Publicly traded	X	41	2,078,774.	Fair market value
10 Securities – Closely held stock				
11 Securities – Partnership, LLC, or trust interests				
12 Securities – Miscellaneous				
13 Qualified conservation contribution – Historic structures				
14 Qualified conservation contribution – Other				
15 Real estate – Residential				
16 Real estate – Commercial				
17 Real estate – Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other ► ( )				
26 Other ► ( )				
27 Other ► ( )				
28 Other ► ( )				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement

29 0.

30a During the year, did the organization receive by contribution any property reported in Part I, lines 1-28 that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period?

b If 'Yes,' describe the arrangement in Part II

31 Does the organization have a gift acceptance policy that requires the review of any non-standard contributions?

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?

b If 'Yes,' describe in Part II.

33 If the organization did not report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II

	Yes	No
30a		X
31	X	
32a	X	
33		

**BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990.**

Schedule M (Form 990) 2011

**Part II** **Supplemental Information.** Complete this part to provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

Pt I Line 32b Financial institutions/brokers used to sell marketable securities

**SCHEDULE O**  
**(Form 990 or 990-EZ)**

**Supplemental Information to Form 990 or 990-EZ**

OMB No 1545-0047

**2011**

**Open to Public  
Inspection**

Department of the Treasury  
Internal Revenue Service

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.  
▶ Attach to Form 990 or 990-EZ.

Name of the organization

Donors Trust, Inc.

Employer identification number

52-2166327

Pt III, Line 3 THE ORGANIZATION CEASED THE STUDENT FREE PRESS ASSOCIATION

Pt III, Line 3 PROJECT WHICH BECAME A FREE STANDING PUBLIC CHARITY

Pt III, Line 3 THE LAW AND ECONOMICS CENTER RELOCATION PROJECT WAS

Pt III, Line 3 COMPLETED DURING 2010

Pt VI, Line 19 IF REQUIRED TO BE DISCLOSED BY APPLICABLE STATUTE,

Pt VI, Line 19 REGULATION OR OTHER ADMINISTRATIVE RULE, AVAILABLE BY

Pt VI, Line 19 REQUEST AT ORGANIZATION'S OFFICE.

Pt VI, Line 11a FORM 990 REVIEWED BY PRESIDENT & CFO PRIOR TO FILING.

Pt VI, Line 11a IN ADDITION, FORM 990 IS DISTRIBUTED TO ALL BOARD MEMBERS

Pt VI, Line 11a AND OFFICERS SHORTLY AFTER FILING FOR THEIR REVIEW AND

Pt VI, Line 11a COMMENTS. IF ANY ISSUES ARE RAISED, APPROPRIATE

Pt VI, Line 11a REMEDIAL ACTION IS TAKEN, INCLUDING FILING AN AMENDED

Pt VI, Line 11a FORM 990 IF NECESSARY.

Pt VI, Line 3 SOME PROGRAMS LISTED AT PART III USE INDEPENDENT CONTRACTORS.

Pt VI, Line 3 DIRECT SUPERVISION OF INDEPENDENT CONTRACTORS CARRYING OUT

Pt VI, Line 3 RESEARCH, WRITING AND OTHER ACTIVITY ASSOCIATED WITH CERTAIN

Pt VI, Line 3 PROGRAMS IS THE RESPONSIBILITY OF AN INDEPENDENT CONTRACTOR MANAGING

Pt VI, Line 3 THE PROGRAM WHO HAS EXPERIENCE & EXPERTISE IN THE AREA OF RESEARCH OR

Pt VI, Line 3 ACTIVITY. EACH OF THESE CONTRACTORS IS DIRECTLY SUPERVISED BY THE

Pt VI, Line 3 ORGANIZATION'S OFFICERS. THE PROGRAMS WITH INDEPENDENT

Pt VI, Line 3 CONTRACTORS THAT OVERSEE OTHER INDEPENDENT CONTRACTORS

Pt VI, Line 3 ARE: NPS, CCAP, PFR & CCAF. SEE PART II, LINE 4 FOR DESCRIPTION

Pt VI, Line 3 OF EACH PROGRAM LISTED HERE.

Pt VI, Line 12c THE ORGANIZATION ASKS EACH BOARD MEMBER AND OFFICER TO

Pt VI, Line 12c ATTEST TO COMPLIANCE WITH THE POLICY ON AN ANNUAL BASIS

Pt VI, Line 15 THE ORGANIZATION HAS A COMPENSATION COMMITTEE COMPRISED

Name of the organization

Employer identification number

Donors Trust, Inc.

52-2166327

Pt VI, Line 15 OF INDEPENDENT BoD MEMBERS THAT APPROVES SALARIES ON AN

Pt VI, Line 15 ANNUAL BASIS AFTER REVIEWING COMPARABLES

Pt XI Unrealized loss on marketable securities \$240,056

Pt XI Prior period increase in expenses \$27,850

Pt XI Prior period decrease in revenue \$17,110

Pt XI Accrual for SEP-IRA catch up payment \$55,000

Pt XI Total adjustment \$340,016

Pt VI-C, Line 17 AK,AL,AR,AZ,CA,CO,CT,DC,FL,GA,IL,KS,KY,MA,MD,ME,MI,

Pt VI-C, Line 17 MN,MO,MS,NC,ND,NH,NJ,NM,NY,OH,OK,OR,PA,RI,SC,TN,

Pt VI-C, Line 17 UT,VA,WA,WI,WV.

## Schedule O (Form 990), Supplemental Information to Form 990

**Form 990, Page 2, Part III, Line 1 (continued)**

Briefly describe the organization's mission:

RELATING TO SOCIAL WELFARE, HEALTH, ENVIRONMENT, ECONOMICS, GOVERNANCE, FOREIGN RELATIONS AND ARTS AND CULTURE; AND WHICH ENCOURAGE PHILANTHROPY AND INDIVIDUAL GIVING AND RESPONSIBILITY AS AN ANSWER TO SOCIETY'S NEEDS, AS OPPOSED TO GOVERNMENTAL INVOLVEMENT.

## Schedule O (Form 990), Supplemental Information to Form 990

**Form 990, Page 2, Part III, Line 4d (continued)**

Describe the exempt purpose achievements for each of the organization's other program services. Section 501(c)(3) and (4) organizations and 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

Code:	Description:	<u>THE PROJECT ON FAIR REPRESENTATION (PFR).</u>
Expenses	<u>197,024.</u>	<u>THE PROJECT ON FAIR REPRESENTATION WORKS TO EFFECT CHANGE</u>
Grants Of	<u>0.</u>	<u>IN LAW AND PUBLIC POLICY THROUGH A COMBINATION OF</u>
Revenue	<u>0.</u>	<u>RESEARCH, LITIGATION, AND PUBLIC EDUCATION IN THE</u>
		<u>FOUR AREAS WHERE RACIAL DISCRIMINATION IS THE MOST</u>
		<u>ENTRENCHED: VOTING, EDUCATION, PUBLIC CONTRACTING, AND</u>
		<u>EMPLOYMENT.</u>

Code:	Description:	<u>THE SUPPLY SIDE PROJECT (SSP).</u>
Expenses	<u>106,549.</u>	<u>THE SUPPLY SIDE PROJECT DEVELOPS AND ADVANCES</u>
Grants Of	<u>0.</u>	<u>FUNDAMENTAL MARKET-BASED REFORM PROPOSALS FOR</u>
Revenue	<u>0.</u>	<u>SOCIAL SECURITY, MEDICAID, MEDICARE, WELFARE AND</u>
		<u>HEALTH CARE.</u>

Code:	Description:	<u>CENTER FOR CLASS ACTION FAIRNESS (CCAF). BY CONTRACTING WITH</u>
Expenses	<u>388,110.</u>	<u>ATTORNEYS TO PROVIDE PRO BONO REPRESENTATION OF CONSUMERS,</u>
Grants Of	<u>0.</u>	<u>CCAF SEEKS TO INCREASE NET AWARDS TO MEMBERS OF CLASS ACTION</u>
Revenue	<u>87,000.</u>	<u>LAWSUITS THROUGH OBJECTIONS TO SETTLEMENTS PRODUCING</u>
		<u>EXCESSIVE ATTORNEY FEES. AN ADDITIONAL GOAL IS A</u>
		<u>REDUCTION IN MERITLESS CLASS ACTION SUITS AS TRIAL</u>
		<u>ATTORNEYS AWARENESS OF CCAF'S WATCHDOG ROLE INCREASES.</u>

Code:	Description:	<u>STUDENT FREE PRESS ASSOCIATION (SFPA). THE STUDENT FREE</u>
Expenses	<u>291,875.</u>	<u>PRESS ASSOCIATION IS AN ORGANIZATION RUN BY</u>
Grants Of	<u>196,903.</u>	<u>VETERAN JOURNALISTS FOR THE BENEFIT OF BEGINNING</u>
Revenue	<u>0.</u>	<u>JOURNALISTS. IT IDENTIFIES AND SUPPORTS COLLEGE</u>
		<u>STUDENTS SEEKING TO IMPROVE CAMPUS JOURNALISM,</u>
		<u>EXPLORE MEDIA CAREERS, AND COMMIT THEMSELVES TO THE</u>
		<u>PRINCIPLES OF A FREE SOCIETY.</u>

Code:	Description:	<u>TALENT MARKET (TM). A FREE TALENT RECRUITMENT PROGRAM</u>
Expenses	<u>125,605.</u>	<u>AVAILABLE TO CHARITIES WHOSE MISSIONS ALIGN WITH</u>
Grants Of	<u>0.</u>	<u>DONORSTRUST'S CHARITABLE MISSION.</u>
Revenue	<u>0.</u>	

Code:	Description:	<u>6 DEGREES PROJECT. SEEKS TO CREATE OPPORTUNITIES</u>
Expenses	<u>69,068.</u>	<u>TO LEVERAGE AND AMPLIFY THE VOICES OF THOSE ADVANCING LIBERTY AND</u>
Grants Of	<u>0.</u>	<u>TO CREATE OPPORTUNITIES FOR STRATEGIC PARTNERSHIPS AND ALLIED</u>
Revenue	<u>0.</u>	<u>RELATIONSHIPS WITH THE INTELLECTUAL VOICES THAT MATTER MOST. THE</u>
		<u>"SIX DEGREES OF SEPARATION" NOTION IS THAT CERTAIN PEOPLE AND THEIR</u>
		<u>NETWORKS ARE KEYS TO ADVANCING AN IDEA AND TIPPING A DEBATE.</u>

**SCHEDULE R**  
(Form 990)

Department of the Treasury  
Internal Revenue Service

**Related Organizations and Unrelated Partnerships**

▶ Complete if the organization answered 'Yes' to Form 990, Part IV, line 33, 34, 35, 36, or 37.  
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

**2011**

Open to Public  
Inspection

Name of the organization

Donors Trust, Inc.

Employer identification number

52-2166327

**Part I Identification of Disregarded Entities** (Complete if the organization answered 'Yes' to Form 990, Part IV, line 33.)

(a) Name, address, and EIN of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
(1) <u>Donors Trust, LLC 27-0704085</u> <u>109 N Henry St, Alexandria 22314</u>	Hold proceeds from 2009 sale of RE donation	MD	0.	0.	Donors Trust, Inc.
(2) <u>Talent Market, LLC 27-0685825</u> <u>109 N Henry St, Alexandria 22314</u>	Provide administrative support services	MD	0.	162,585.	Donors Trust, Inc.
(3) <u>See Continuation Sheet for Schedule R, Part I</u>					

**Part II Identification of Related Tax-Exempt Organizations** (Complete if the organization answered 'Yes' to Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Sec 512(b)(13) controlled entity?	
						Yes	No
(1) <u>Donors Capital Fund, Inc. 54-1934032</u> <u>PO Box 1305, Alexandria VA 22313</u>	Grant making	MD	501(c)(3)	509(a)(1) Type 1 SO	N/A		X
(2)							
(3)							
(4)							

# 2011

Continuation Page 1 of 1

Employer identification number

52-2166327

**Part I** Continuation of Identification of Disregarded Entities[illegible]

**Part III Identification of Related Organizations Taxable as a Partnership** (Complete if the organization answered 'Yes' to Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Dispropor- tionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	
(1) ----- ----- -----												
(2) ----- ----- -----												
(3) ----- ----- -----												

**Part IV Identification of Related Organizations Taxable as a Corporation or Trust** (Complete if the organization answered 'Yes' to Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership
(1) ----- ----- -----							
(2) ----- ----- -----							
(3) ----- ----- -----							



**Part V Transactions With Related Organizations** (Complete if the organization answered 'Yes' to Form 990, Part IV, line 34, 35, 35a, or 36.)**Note.** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule**1** During the tax year did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?**a** Receipt of **(i)** interest **(ii)** annuities **(iii)** royalties or **(iv)** rent from a controlled entity**b** Gift, grant, or capital contribution to related organization(s)**c** Gift, grant, or capital contribution from related organization(s)**d** Loans or loan guarantees to or for related organization(s)**e** Loans or loan guarantees by related organization(s)**f** Sale of assets to related organization(s)**g** Purchase of assets from related organization(s)**h** Exchange of assets with related organization(s)**i** Lease of facilities, equipment, or other assets to related organization(s)**j** Lease of facilities, equipment, or other assets from related organization(s)**k** Performance of services or membership or fundraising solicitations for related organization(s)**l** Performance of services or membership or fundraising solicitations by related organization(s)**m** Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)**n** Sharing of paid employees with related organization(s)**o** Reimbursement paid to related organization(s) for expenses**p** Reimbursement paid by related organization(s) for expenses**q** Other transfer of cash or property to related organization(s)**r** Other transfer of cash or property from related organization(s)

	Yes	No
<b>1 a</b>		X
<b>1 b</b>	X	
<b>1 c</b>	X	
<b>1 d</b>		X
<b>1 e</b>		X
<b>1 f</b>		X
<b>1 g</b>		X
<b>1 h</b>		X
<b>1 i</b>		X
<b>1 j</b>		X
<b>1 k</b>		X
<b>1 l</b>	X	
<b>1 m</b>	X	
<b>1 n</b>		X
<b>1 o</b>		X
<b>1 p</b>	X	
<b>1 q</b>		X
<b>1 r</b>		X

**2** If the answer to any of the above is 'Yes,' see the instructions for information on who must complete this line, including covered relationships and transaction thresholds

(a) Name of other organization	(b) Transaction type (a-r)	(c) Amount involved	(d) Method of determining amount involved
(1) N/A - No controlled entities as defined by IRC sec 512 (b) (13)			
(2)			
(3)			
(4)			
(5)			
(6)			

**Part VI** **Unrelated Organizations Taxable as a Partnership** (Complete if the organization answered 'Yes' to Form 990, Part IV, line 37.)

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

(a) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unre- lated, excluded from tax under section 512-514)	(e) Are all partners section 501(c)(3) organizations?		(f) Share of total income	(g) Share of end-of-year assets	(h) Dispropor- tionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 Form (1065)	(j) General or managing partner?		(k) Percentage ownership
				Yes	No			Yes	No		Yes	No	
(1) ----- ----- -----													
(2) ----- ----- -----													
(3) ----- ----- -----													
(4) ----- ----- -----													
(5) ----- ----- -----													
(6) ----- ----- -----													
(7) ----- ----- -----													
(8) ----- ----- -----													

**Part VII** Supplemental Information

Complete this part to provide additional information for responses to questions on Schedule R (see instructions).

Area for supplemental information with horizontal dashed lines.

**Supporting Statement of:**

Form 990 p 9/Other amt. not included

Description	Amount
Total contributions	39,267,594.
Total	<u>39,267,594.</u>

**Supporting Statement of:**

Form 990 p 9/Noncash

Description	Amount
Marketable securities	2,078,774.
Total	<u>2,078,774.</u>

**Supporting Statement of:**

Form 990 p 9/Sales of Securities

Description	Amount
Proceeds sale marketable securities	8,572,162.
Total	<u>8,572,162.</u>

**Supporting Statement of:**

Form 990 p 9/Gross Basis Amount

Description	Amount
Basis of marketable securities sold	8,693,556.
Total	<u>8,693,556.</u>

**Supporting Statement of:**

Form 990 p 11/Line 11, column (A)

Description	Amount
Various publicly traded securities	2,979,850.
Total	<u>2,979,850.</u>

**Supporting Statement of:**

Form 990 p 11/Line 11, column (B)

Description	Amount
Various publicly traded securities	5,426,007.
Total	<u>5,426,007.</u>

**Supporting Statement of:**

Sch D, page 2/Part V, line 1e col (a)

Description	Amount
Direct program expenses	1,712,039.
Total	<u>1,712,039.</u>

**Supporting Statement of:**

Sch D, page 2/Part V, line 1e col (b)

Description	Amount
Program related direct expenses	1,912,824.
Total	<u>1,912,824.</u>

**Supporting Statement of:**

Sch D, page 2/Part V, line 1e col (c)

Description	Amount
Program related direct expenses	976,327.
Total	<u>976,327.</u>

**Supporting Statement of:**

Sch D, page 2/Part V, line 1e col (d)

Description	Amount
Program related direct expenses	1,103,256.
Total	<u>1,103,256.</u>

**Supporting Statement of:**

Sch D, page 4/Part XI, Line 8

Description	Amount
SEP-IRA prior period expense accrual	-55,000.
Total	<u>-55,000.</u>

**Supporting Statement of:**

Sch D, page 4/Part XII, Line 4b

Description	Amount
Legal fee recovery treated as expense offset for book purposes	87,000.
Total	<u>87,000.</u>

**Supporting Statement of:**

Sch D, page 4/Part XIII, Line 2d

Description	Amount
SEP-IRA accrual for book purposes to be paid during 2012 and report for tax purposes during 2012	55,000.
Rounding	-1.
Total	<u>54,999.</u>

**Supporting Statement of:**

Sch D, page 4/Part XIII, Line 4b

Description	Amount
Legal fee recovery treated as expense offset for book purposes	87,000.
Total	<u>87,000.</u>

Additional Information For Tax Return

4 Donors Trust, Inc.

52-2166327

Form 990 p 6: Line 17-2

See Schedule O for list of states.